



***Version 10***

## **IV- Client Software Manual**

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## Checklist

1. Have you registered the IV-Client with the VaultLogix server? ☐Y ☐N (see **Registering the IV-Client with the VaultLogix server**)  
Comments:
2. Have you added your SMTP settings? ☐Y ☐N (see **Configuring Client Email Notifications**)  
Comments:
3. Have you configured general client preferences? ☐Y ☐N (see **Configuring Client Preferences**)  
Comments:
4. Have you configured templates? ☐Y ☐N (see **Configuring Templates**)  
Comments:
5. Have you setup a scheduled backup? ☐Y ☐N (see **Creating a Schedule**)  
Comments:
6. Have you reviewed retention rules for backup? ☐Y ☐N (see **Retention Rules for Backup**)  
Comments:
7. Have you reviewed retention rules for archiving (if applicable)? ☐Y ☐N (see **Retention Rules for Archival Purposes**)  
Comments:
8. Have you setup a MSSQL backup? ☐Y ☐N (see **Running a MSSQL Backup**)  
Comments:
9. Have you setup a MS Exchange backup full or brick level backup? ☐Y ☐N (see **Running a MS Exchange Backup**)  
Comments:
10. Have you reviewed how to perform a system state backup? ☐Y ☐N (see **Running a System State Backup**)  
Comments:
11. Have you setup a Linux, MAC, etc... backup using SSH/SSL? ☐Y ☐N (see **Running a Backup via FTP/SFTP/FTPS**)  
Comments:
12. Have you learned how to delete files from the online vault? ☐Y ☐N (see **Deleting Online Vault Files**)  
Comments:
13. Have you learned how to delete a scheduled backup job? ☐Y ☐N (see **Deleting a Scheduled Backup Job**)  
Comments:
14. Have you learned how to restore? ☐Y ☐N (see **Restoring Backups**)  
Comments:
15. Have you learned how to restore from the archive server (if applicable)? ☐Y ☐N (see **Restoring from an Archive Server**)  
Comments:

16. Have you gone through the advanced restore options? ☐Y ☐N (see **Advanced Restore Options**)  
Comments:
17. Have you learned how to perform an initial large backup to local disk? ☐Y ☐N (see **Initial Large Backup to Local USB Disk**)  
Comments:
18. Have you learned how to span a large initial backup over X hours? ☐Y ☐N (see **Spanning a Large Initial Backup**)  
Comments:
19. Have you registered a replication server (if applicable)? ☐Y ☐N (see **Registering a Replication Server**)  
Comments:
20. Have you reviewed the client reporting? ☐Y ☐N (see **Reports and Logs**)  
Comments:
21. Have you tested a backup with the IV-Client using a client that you setup in the web operator? ☐Y  
☐N  
Comments:
22. Have you read, and, re-read, the manuals and knowledge base and web site? ☐Y ☐N  
Comments:

## VaultLogix IV-Client Pre-Installation Requirements

### Minimum System Requirements:

#### 1) Supported Operating Systems

Platform	Version
Windows® 2000	Professional SP4 >, or Server SPP4 >, or Advanced Server SP4>
Windows® XP	Professional SP2>, or Media Center SP2>, or
Windows® Vista	Business SP1>, or Ultimate SP1>, or Enterprise SP1>
Windows® 2003/2008/2008 R2	Standard SP1>, or Enterprise SP1 >, or SBS SP1 >
Windows® 7	Professional >, or Enterprise >, or Ultimate

#### 2) Minimum Hardware Requirements

For optimal performance, install the IV-Client on the best, name brand hardware that you can afford.

Hardware	x86, x64 (64 bit recommended)
2 dual CPU	2.0GHZ >
RAM	<1M files 3GB > 2M files + 4GB >
Storage Requirements	<p>A minimum requirement of 1GB&gt; of storage space is recommended but is purely based on usage patterns. The more you backup the larger this local storage will grow.</p> <p>Note: A local copy of the data is NOT stored on the client unless the local storage component is enabled.</p>

## Document Revision History Table

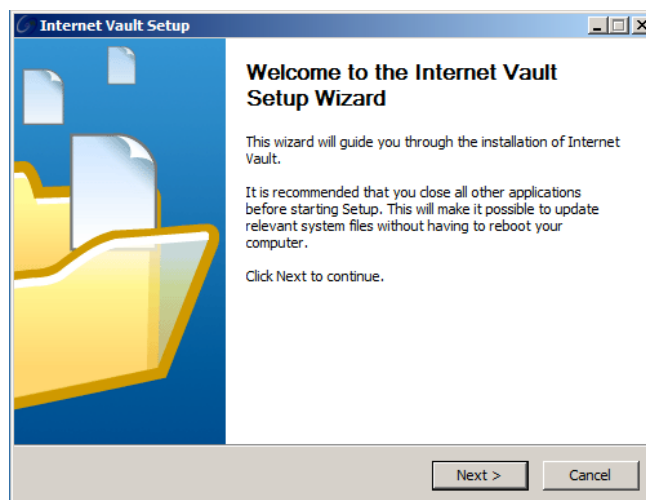
This table only lists major changes or additions

Version/Date	Notes
8.0.1	ACL/ADS functions Local Storage Customer Encryption keys New Archive screens Customer management console
8.0.1.1	Backup to local storage Advanced Exchange setup moved to Troubleshooting (not needed in 8.x) Retry/Cancel options added under Preferences
8.0.1.3	Backing up Novell Restoring to a MS Exchange Recovery Group
9.0.0.0	Thin Exchange Restore Command Line First Time Run Wizard Expanded on Logs Removed Client Side Replication
9.0.3.0	Expanded on First Time Run Wizard Plug-in section added
10.1.0	Brick level for 2007 (MAPI) MSSQL THIN Differential XML Logs Updated hardware requirements

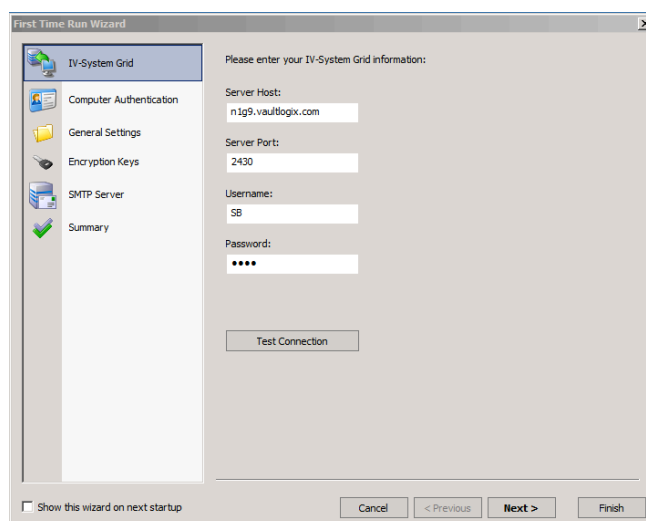
## Initial Setup and Configuration

### Installing the VaultLogix IV-Client

1. Download and Double Click on the IV-Client executable
2. Click **Next**



3. Read through the License Agreement and Click **I Agree** to proceed
4. Browse to the installation location or Click **Next** to use the default location
5. Choose a start menu name and Click **Install**
6. Click **Next** to complete the installation
7. Click **Finish** to launch the IV-Client
8. You will now be prompted with the First Time Run Wizard (FTRW). The FTRW will allow you to easily configure the IV-Client with all the required information it needs to run. To skip the FTRW, click **Cancel** and proceed to manually configuring the client, starting with **Registering the VaultLogix IV-Client with the VaultLogix Server**, below.





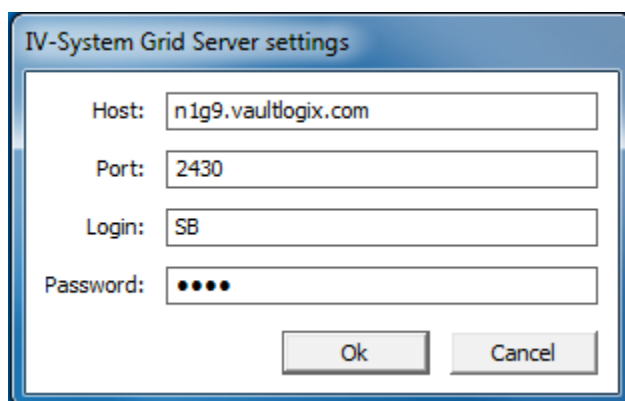
## Registering the VaultLogix IV-Client with the VaultLogix Server

Registering an account with the VaultLogix server is required so that backups and restores (remote and local) can be performed to the designated VaultLogix server.

1. From the main menu, Click **Tools** and Click **Add a backup server**



2. Enter the appropriate information below
3. Click **OK**



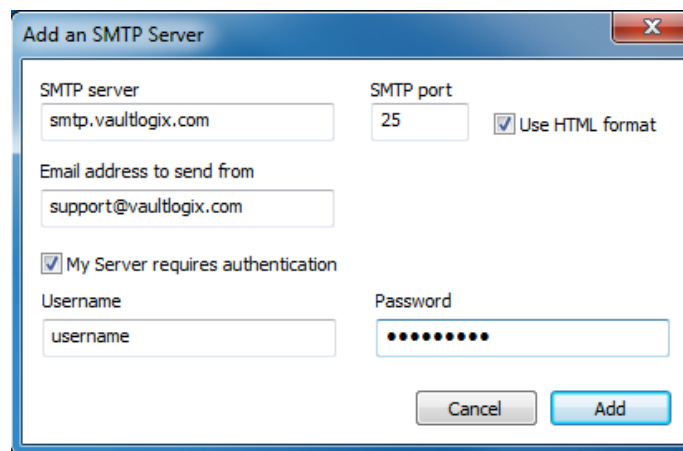
**NOTE:** This process can also be accomplished by using the First Time Run Wizard (FTRW). The FTRW can also be accessed at any given time by clicking **File> First time run wizard...**

4. Registering an account can also be done on the server selection screen (see **Create a New Schedule**)

## Configuring Client Email Notifications (SMTP)

With VaultLogix, you can receive email backup status reports per backup job. Adding your SMTP server to the IV-Client is done via the main toolbar.

1. **Start > Programs > VaultLogix Internet Vault> VaultLogix Internet Vault**
2. Click on **Tools**
3. Click on **Manage SMTP servers**
4. Click **Create**
5. Fill in the appropriate fields below
6. If your server requires authentication, Check the **My Server requires authentication** box
7. Add your username and password
8. Click **Add**



9. Click **OK**
10. Done

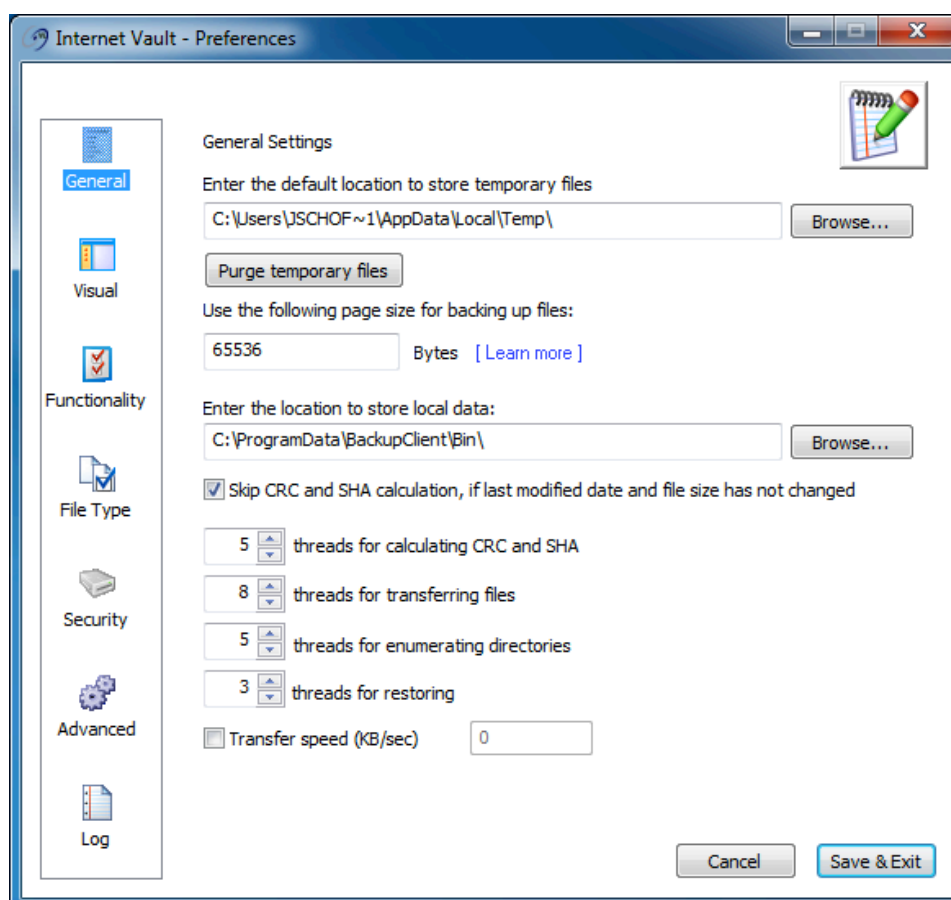
**NOTE:** This process can also be accomplished by using the First Time Run Wizard (FTRW). The FTRW can also be accessed at any given time by clicking **File> First time run wizard...**

## Configuring Client Preferences

The VaultLogix Preferences menu, available from the toolbar, allows you to manage a wide variety of settings and preferences.

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
1. Click on Tools
2. Click on Preferences

The top-level preference settings are **General**, **Visual**, **Functionality**, **File Type**, **Security**, **Advanced**, and **Log**. The default screen is General Preferences.



## General Preferences

>>**Enter the default location to store temporary files:** This option allows you to set a default location (UNC, mapped drive or local machine) for temporary files. (see **Does VaultLogix use temporary files during backup and restore**)

1. To select a temporary location, Click **Browse** and go to the desired location(s) to set the path
2. Click **OK**

>> **Use the following page size when backing up files:** Page Size is the amount of RAM used to read the files to be backed up. This gives you the opportunity to optimize your backups based on the RAM on the machine you have the IV-Client installed on.

**Note:**

The Page Size setting must be between 1260 bytes and 100 MB

>> **Enter the location to store local file information:** Used to store a small amount of file information that is used to increase backup efficiency.

>>**Skip CRC & SHA calculation, if last modified date and file size has not changed:** By default the IV-Client will NOT calculate CRC/SHA hashes if a file's modified data or file size has not changed.

>> **Threads for calculating CRC & SHA:** Dictates the number of threads to be used when calculating file hashes.

>> **Threads for transferring files:** Dictates the number of threads to be used when transferring files to the VaultLogix server.

>> **Threads for enumerating directories:** Dictates the number of threads to be used when discovering the files to be backed up.

**Note:** For more information on CRC & SHA hashes see, **What are CRC & SHA hashes?**

>> **Transfer speed (bytes per second):** Transfer speed, also known as bandwidth throttling, allows you to limit the bandwidth that the IV-Client uses at backup time.

**Note:** For a complete list of descriptions please see the VaultLogix knowledge base under your VaultLogix customer portal

## Visual Settings

Visual settings allow you to set advanced visual settings such as keeping the backup window open after successful/unsuccessful backups or disabling the system tray icon during backup time.

**Note:** For a complete list of descriptions please see the VaultLogix knowledge base under your VaultLogix customer portal

## Functionality Settings

**>>Skip LAN loading for faster computer backup:** Once the IV-Client is launched, it automatically searches your entire network for all networked machines. To avoid this step upon launch, Click this option ON to instead load for a saved list of machines.

**>> Allow at most one backup to run at a time:** Will NOT allow concurrent backup jobs to run.

**>> Do not calculate backup size:** This refers to stopping the process of calculating the total size of the files that you have selected to backup in the file tree window.

**>>Delete PST files after brick-level exchange backup:** When restoring a brick level exchange (mail box level), VaultLogix first restores the PST files and then uses the EXMERGE utility to insert them into the Exchange database.

**>>Force LAN loading when backup starts from scratch:** If you want the IV-Client to check for new computers that have been added to your LAN each time a backup starts from scratch, select the Force LAN Loading option.

**>>Allow computer to enter a suspended state while backups are running:** By default the VaultLogix IV-Client will not allow a computer to enter sleep mode while running a backup.

**>>Connection lost settings:** In the case of a loss of connectivity to the Internet, the IV-Client will attempt to automatically reconnect a backup job ten times, with a 60 second time interval in between of each reconnect attempt, before automatically cancelling the job.

**Note:** For a complete list of descriptions please see the VaultLogix knowledge base under your VaultLogix customer portal

## File Type Settings

>> **Backup files of size 0:** By default the IV-Client will automatically backup files that are 0 bytes in size.

>> **Backup operating system files:** By default the IV-Client does backup operating system files

>> **Backup read only files:** By default the IV-Client does backup files that are marked as, READ ONLY.

>> **Backup temporary files:** By default the IV-Client does backup temporary files

>> **Backup hidden files:** By default the IV-Client does backup hidden files.

Note: By default templates WILL search through hidden files even if this option is checked to OFF. (See **Templates** for more information)

**Note:** For a complete list of descriptions please see the VaultLogix knowledge base under your VaultLogix customer portal

## Security

>> **Enable authentication when opening the backup client:** The IV-Client has built in security to protect your data from unauthorized access. To enable authentication, **Check on Enable Authentication** and enter in a username/password.

>> **Use a randomly generated encryption key:** By default an encryption key is generated randomly for each block of data. An account is authorized to certain keys if it has the block in one of its backup set versions. This allows you to change your username/password at any time, as your encryption key is not in any way linked to the password.

>> **Use a specific customer encryption key:** A customer encryption key is usually used by corporate clients that want a user generated encryption key to be used by their entire organization when backing up to a Managed Service Provider.

**NOTE:** This user generated customer encryption key will be **REQUIRED** at the time of restore. Without it, the data will **NOT** be able to be restored.

>> **Use a specific customer and user encryption key:** A customer/user encryption key is usually used by corporate clients that want not only a customer encryption key for their entire organization but also a secondary, per location encryption key when backing up to a Managed Service Provider.

**NOTE:** These user generated customer/user encryption keys will be **REQUIRED** at the time of restore. Without them, the data will **NOT** be able to be restored.

## Advanced Settings

>>**Enter a file path to an application you would like to start before backup:** The IV-Client enables you to automatically run a service or script before running a backup job.

>>**Enter a file path to an application you would like to start after backup operations:** The IV-Client enables you to automatically run a service or script after a backup job has ran.

>> **CPU throttling:** Allows you choose how much processing power you want to dedicate to running your backups.

**Note:** For a complete list of descriptions please see the VaultLogix knowledge base under your VaultLogix customer portal

## Log Settings

Log settings gives you advanced log settings such as the store location of logs and enabling certain module logging (FTP, SMTP).

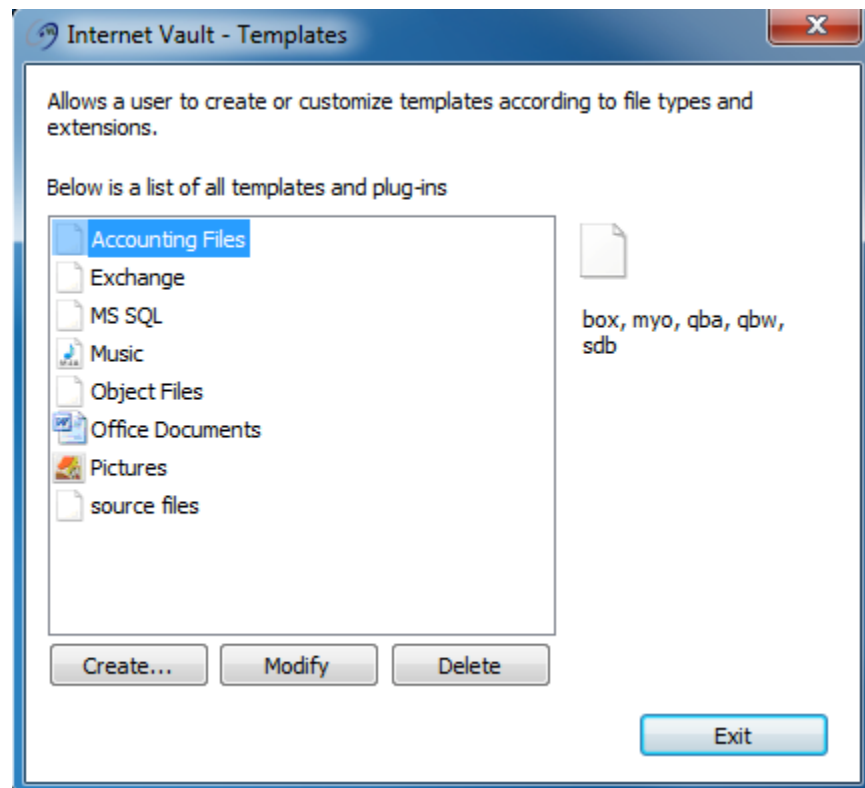
**Note:** For a complete list of descriptions please see the VaultLogix knowledge base under your VaultLogix customer portal

## Configuring Templates

Templates allow you to quickly backup all your mission critical data by file type no matter of its physical location on your network or remote machines.

### Creating a Template

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault.
2. Click on Manage Templates
3. Click Create

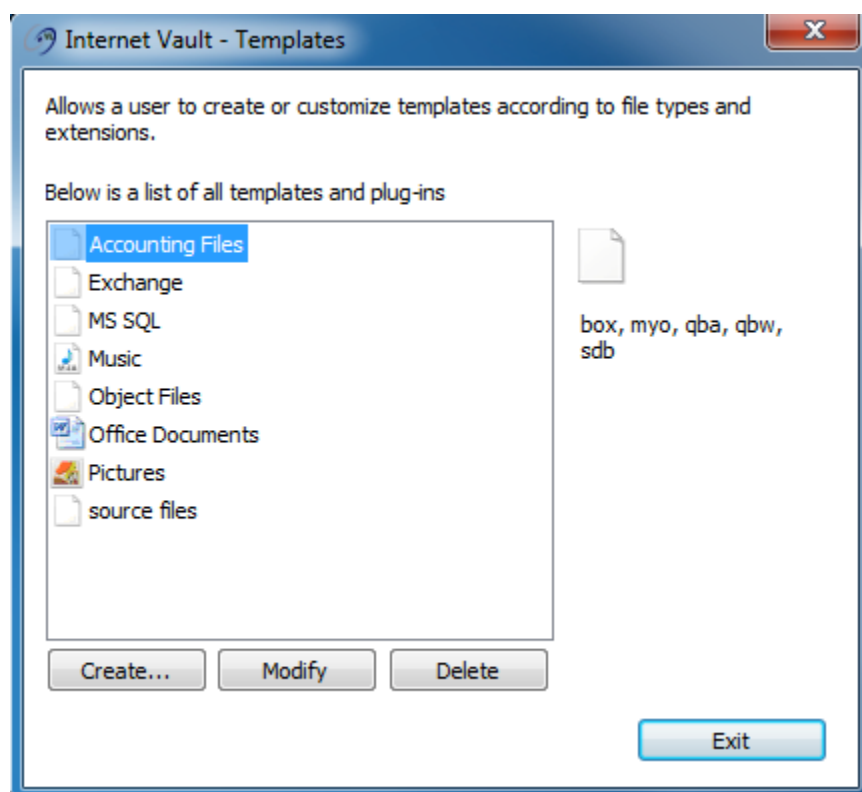


4. Type a name for the template then add the files types you want associated with the template.
5. When finished, click Save. Your template is now available for use in backup jobs.



## Editing Existing Templates

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on **Manage Templates**
3. Select the Template you wish to modify
4. Click the **Modify** button



5. Modify the Template of your choice by adding or removing file types from it

### Note:

Editing a template will affect all existing backups associated with the template.

6. When finished, click Save. Your template is now available for use in backup jobs.

## Secondary Setup

### Adding a Networked Computer

Internet Vault's agentless structure simplifies the process of adding new networked computers to your VaultLogix backup strategy.

**NOTE:** Internet Vault will automatically discover all networked machines on your LAN that can be seen by Windows® unless otherwise specified under Preferences (See **Preferences**). This feature is used to manually discover machines that don't appear in your Internet Vault file tree and can include Windows®, Linux or MAC machines.

1. **Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault**
2. Click on **Tools**
3. Click on **Add a networked computer**
4. Enter the machine's UNC path
5. Enter your user name and password
6. Click **Add**

#### Definition:

UNC stands for Universal Naming Convention. UNC names consist of three parts: the server name; a share name, and an optional file path. These are combined using backslashes as follows

```
\\server\share\file_path
```

7. **Done**

## Setting up Client Side Encryption Keys

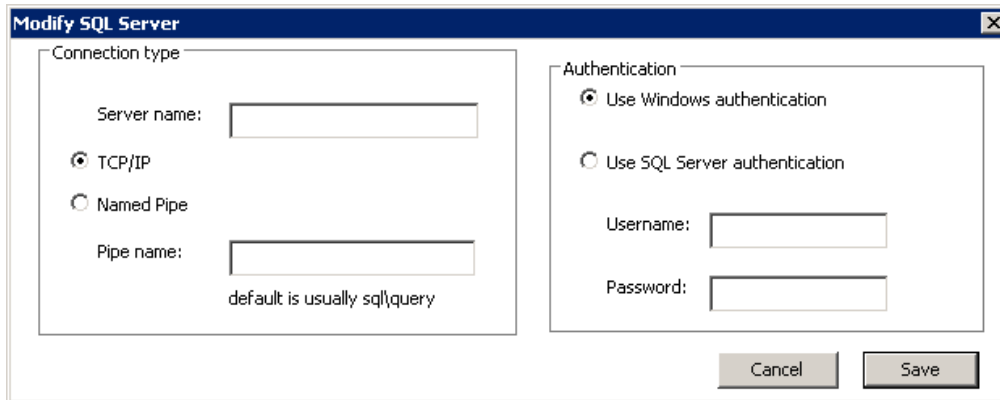
By default, an encryption key is generated randomly for each block of data. An account is authorized to certain keys if it has the block in one of its backup set versions. This allows you to change your username/password at any time, as your encryption key is not in any way linked to the password.

Alternatively, you are free to add customer encryption key or a user encryption key, or both that only you will know. These client side key(s) will be REQUIRED at restore time. Without these keys, the data will NOT be recoverable.

Note: To review client side encryption keys in detail, see **Preferences> Security** above.

## Adding an MS SQL Server

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Create a New Schedule
3. Type in a unique backup name
4. Choose **MSSQL Backup**
5. Click **Next**
6. Click **ADD**
7. Choose your preferred connection method (TCP/IP or Named Pipe) and fill in the associated information. Click **Add** to continue



### Definitions:

**Server Name:** The name of the SQL server or IP address you wish to connect to and backup

**Port:** The actual port the SQL server is running on. (TCP/IP needs to be enabled on the SQL server)

**Pipe name:** A common SQL connection method. (SQL Pipe needs to be enabled on the SQL server)

**Windows authentication:** A standard Microsoft authentication protocol

**SQL Server authentication:**

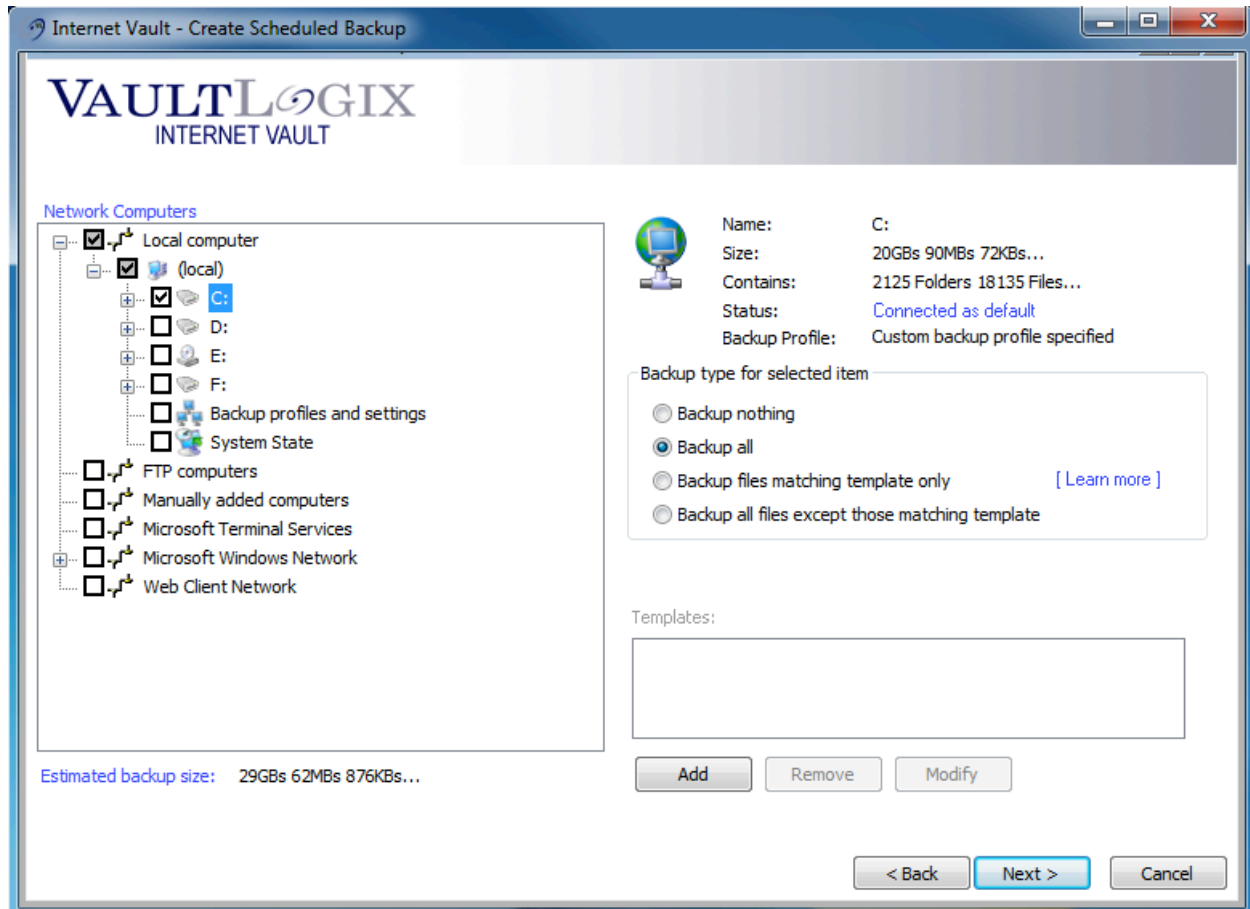
**Username:** A user account that has access to the SQL Server

**Password:** The password that is associated with the username name that has access to the SQL Server

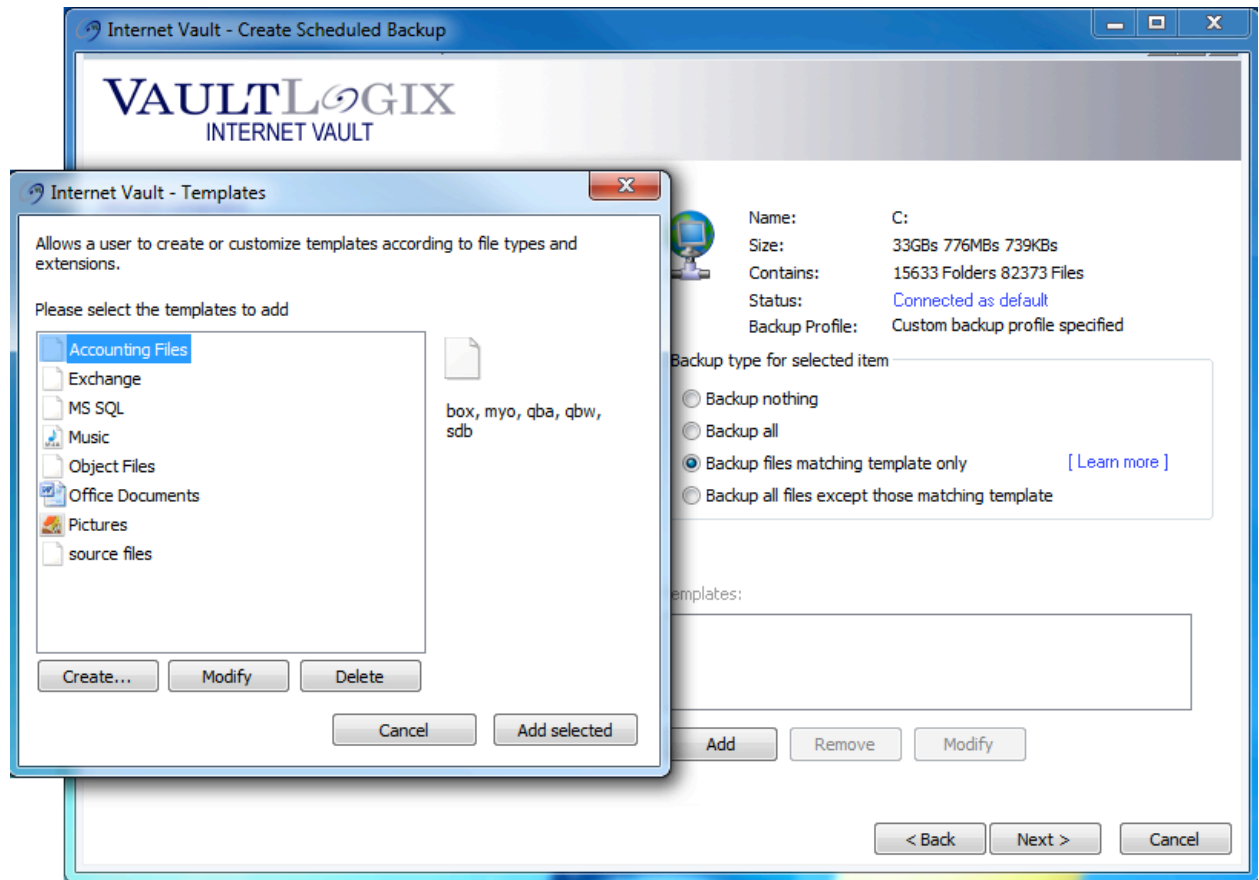
8. Done

## Using Templates

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault.
2. Click on **Create a New Schedule**
3. Enter a unique name for the backup job
4. Choose File Backup
5. Specify the computers/drives that you wish to apply the template backup to



6. Since a template applies to this backup, Click either **Backup files matching template only** to backup only those files in your chosen template, or **Backup all files except those matching template** to backup everything except those files in your chosen template.

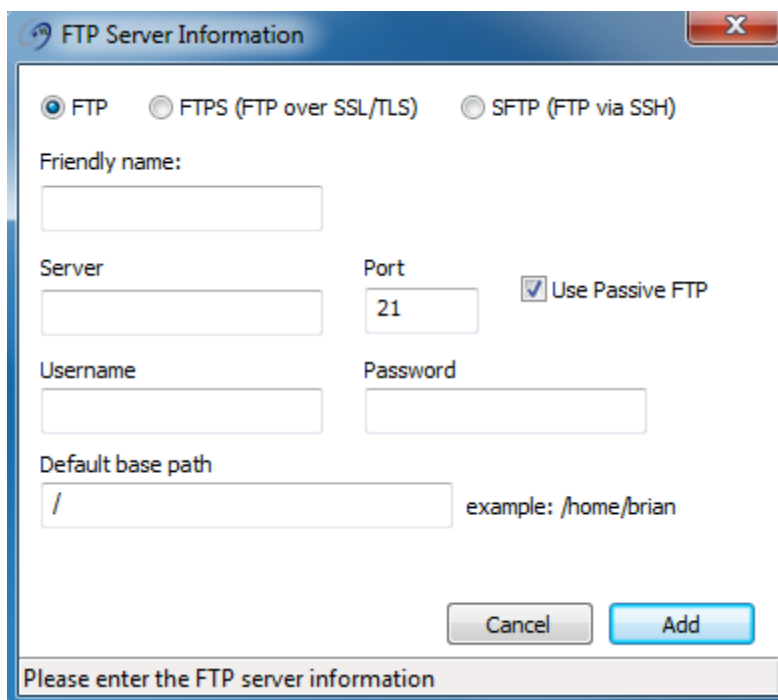

**Note:**

Internet Vault powered templates will search throughout a specified location and locate and backup all files matching the template no matter if they're hidden or not.

7. On the Templates screen, Click the template(s) to use, then Click **Add selected** to add them to the backup job.
8. Once you're done with your template selections, Click **Next** and proceed with the rest of the Creating a New Schedule process (see **Creating a New Schedule**)

## Adding an FTP/SFTP/FTPS server

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Tools
3. Click on **Manage FTP, SFTP, FTPS servers**
4. Click **Create**
5. Fill out the information below
6. Click **Add**



### Definitions:

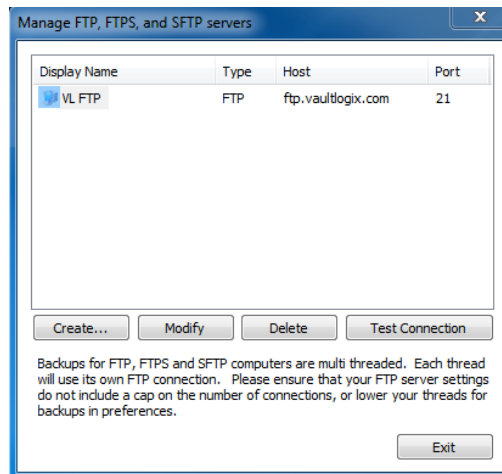
**Friendly Name:** A name given by the user for a specific FTP server so they know what the path represents later. For example, instead of later seeing a default of, say, ftp.VaultLogix.com, you would see 'VaultLogix Primary FTP Server'. This provides more user-friendly information for the end user.

**Passive FTP:** Using passive FTP, a PASV command is sent instead of a PORT command. Instead of specifying a port that the server can send to, the PASV command asks the server to specify a port it wishes to use for the Data Channel connection. If passive FTP is not checked, the client connects from a random unprivileged port (N > 1024) to the FTP server's command port, port 21

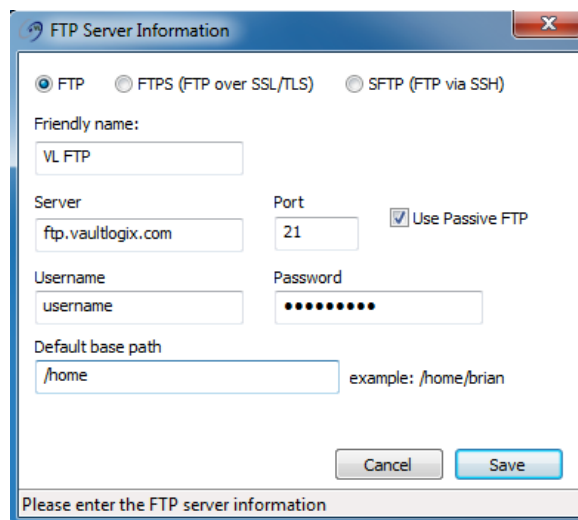
7. Click **OK**
8. Click **Exit**

## Editing a FTP/SFTP/FTPS Server

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Tools
3. Click on **Manage FTP, SFTP, FTPS servers**
4. Select the desired server
5. Click **Modify**



6. Make the appropriate changes
7. Click **Save**

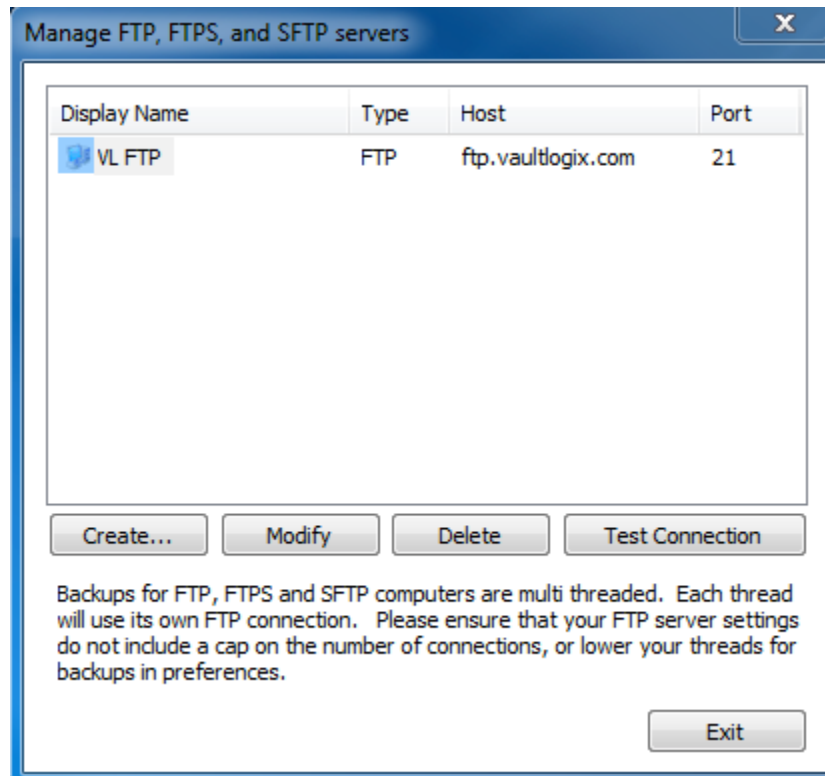


8. Click **OK**
9. Click **Exit**



## Deleting a FTP/SFTP/FTPS Server

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Tools
3. Click on **Manage FTP, SFTP, FTPS servers**
4. Select the desired server
5. Click **Delete**



6. Click **Yes**
7. Click **OK**

## Plug-ins

Internet Vault was designed from the ground up with expandability in mind. This expandability is accomplished through our robust plug-in infrastructure. A plug-in allows any software developer to enhance the functionality of the Internet Vault system by enabling new backup functions by creating a plug in for it. A plug-in can easily be added to the VaultLogix IV-Client through the VaultLogix Customization Kit or via double clicking a self extracting Plug-in (.exe).

For a complete list of plug-ins with descriptions, please see the Knowledge Base under your VaultLogix customer portal.

## Open Document Manager - Open File Management

ODM is a robust open file utility that seamlessly gives Internet Vault the power to backup any open, locked or in-use files, ensuring that your business will run without interruption twenty four hours day, seven days a week.

The ODM installation is simple and easy to do. To use ODM, follow the below:

1. Download the ODM software
2. Double Click the installer file and proceed with the installation using the onscreen instructions
3. Done

**Note:** A reboot is NOT required unless you want to backup system files that Windows would have locked before the ODM installation took place

**Note2:** A ODM software installation is required on the host machine (where the VaultLogix IV-Client is installed) and on any networked target machines where you want to backup open or locked files from.

## Backup Scheduler

The VaultLogix System Scheduler runs based on the schedules you setup. These system tools are run via a windows service named BackupScheduler.

The BackupScheduler service itself should always be run as the local system account. The local system account has certain privileges that are needed to properly run schedules throughout your system.

Schedules should always run:

- Schedules will run whether you are logged in, or logged off of the computer.
- Schedules will run if the computer is locked.
- Schedules will run if the computer is asleep.

Authentication information is important for many reasons:

- Authentication information is needed since the user you specify might be the only account with the proper permissions to perform certain tasks.
- Authentication information is needed since the user you specify might have a mapped drive associated with their account.
- Authentication information is needed because if none is specified, the scheduler will run as the local system account user. This account does not have access to the network at all.
- Windows Vista and later requires authentication

If there is no authentication information specified, your scheduler will still run, but Windows will not allow the scheduler to access network resources.

The BackupScheduler works in the following way:

- 1) Try to find a session that is running with the specified user. If one is found, run the scheduler in that user's session.
- 2) If no session is found with the specified user, perform a logon operation. The window will be visible when you logon.
- 3) If no authentication information was specified in Windows Vista the scheduler will not work
- 3.1) If prior to Windows Vista: The scheduler will be visible when you logon.

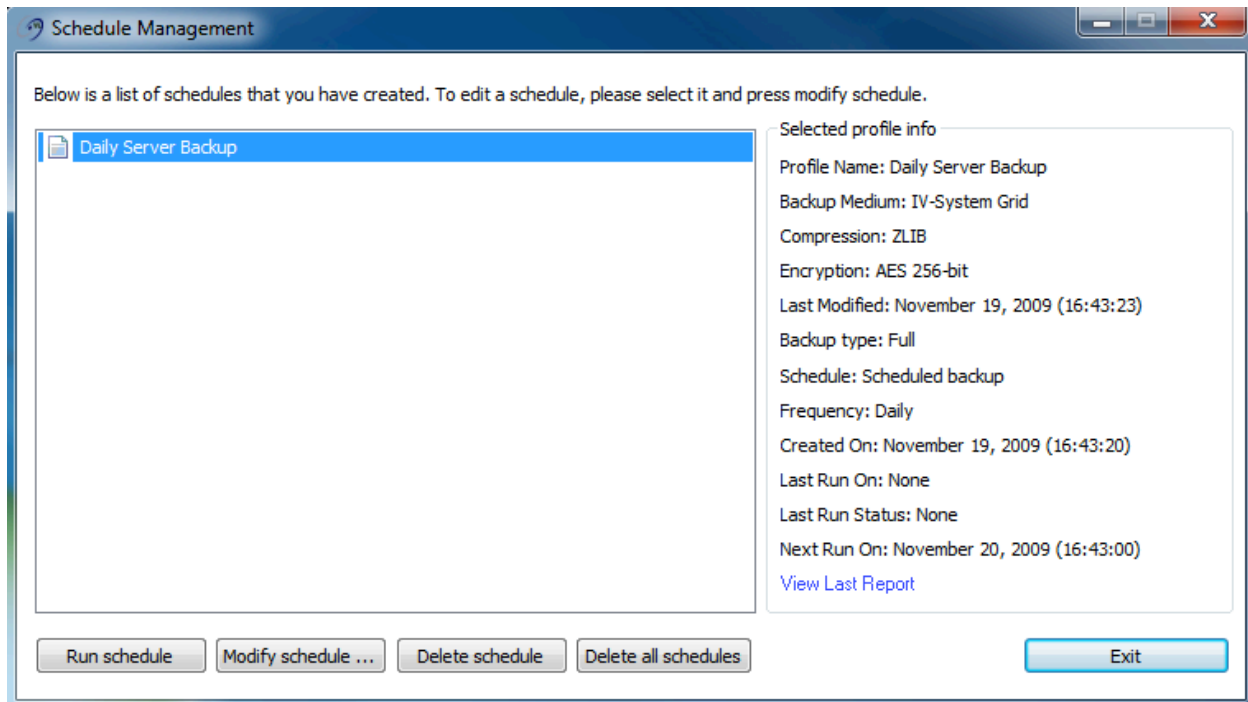
## Creating a Schedule

Creating a backup schedule is performed from the **Create a New Schedule** function available on the Main Menu.

To setup a Schedule, see **Creating a Backup Set**

## Editing a Schedules Run Time

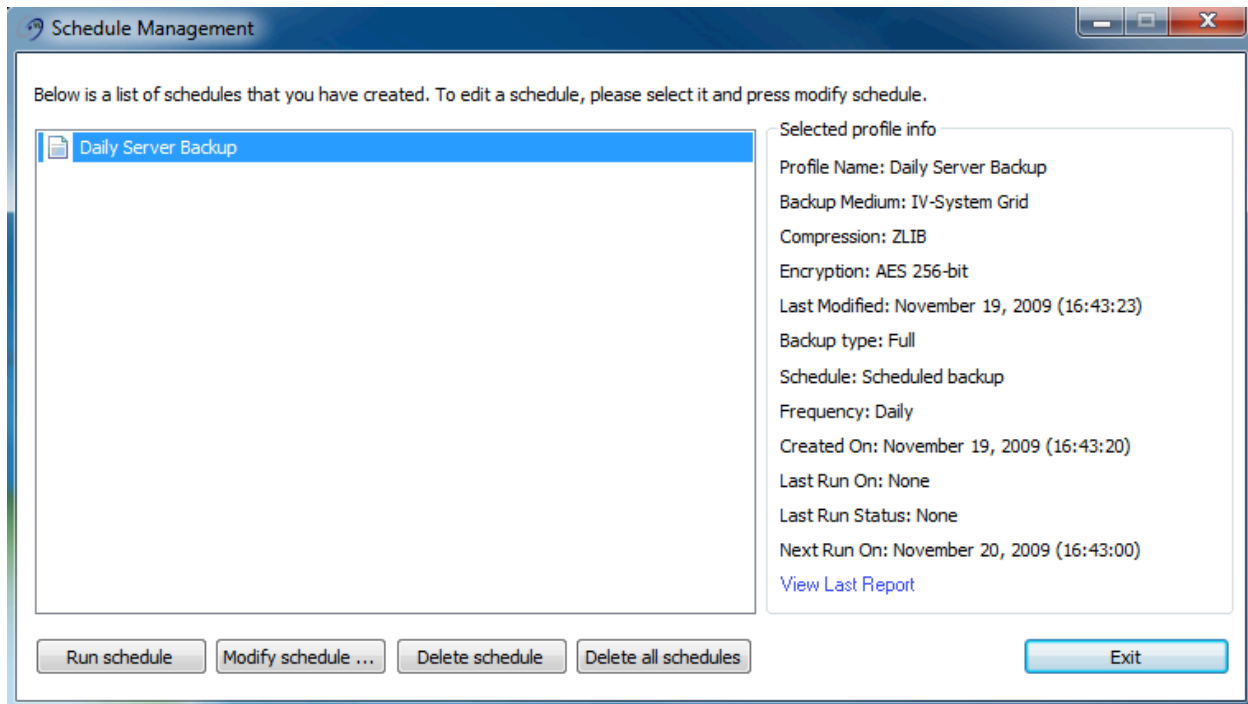
1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Tools
3. Click on **Schedule Management**
4. Select the backup job to edit
5. Click **Modify Schedule**



6. Make any necessary changes
7. Click **OK** when you're finished
8. Done

## Deleting a Scheduled Backup Job

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Tools> Schedule Management
3. Select the backup job to delete



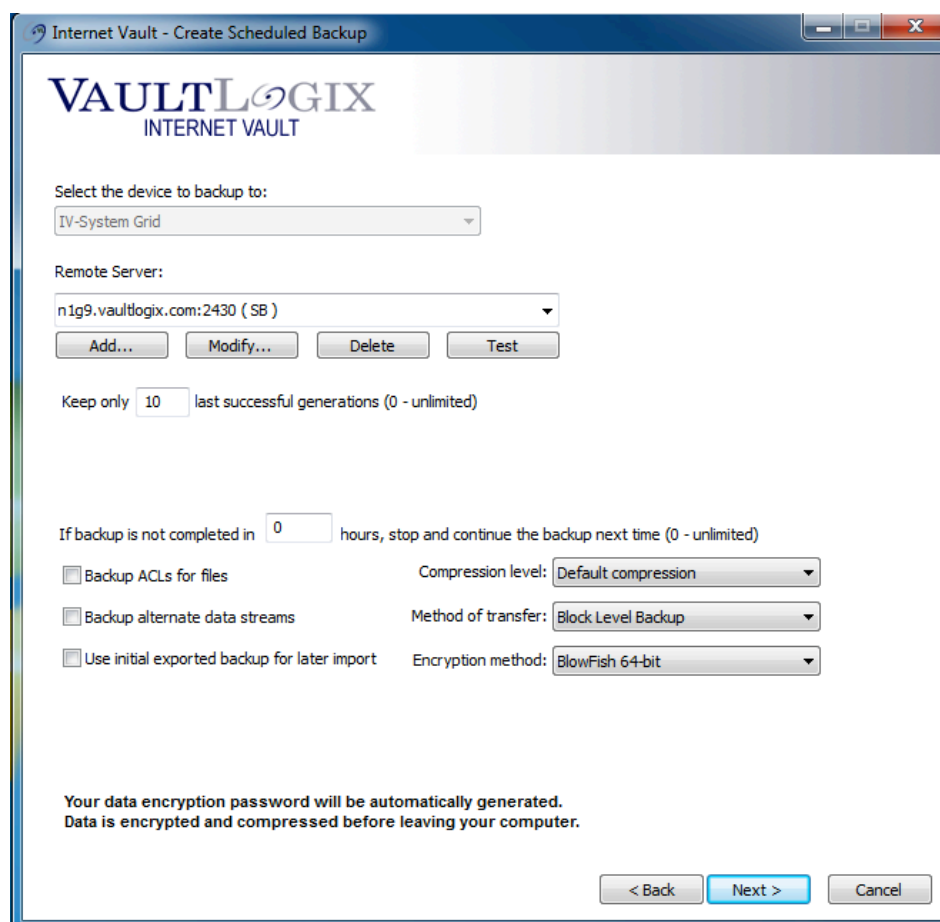
4. Click Yes to delete the profile
5. Done

## Retention Rules

### Retention Rules for Backup

Setting retention rules for backup allows you to define the number of generations of a particular backup job to keep on your offsite server.

1. **Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault**
2. Click on **Create a New Schedule**
3. At the Server selection screen, accept the default of (10) file generations or adjust it to the number you'd prefer. Click **Next** to **proceed** with the backup.



Internet Vault - Create Scheduled Backup

**VAULTLOGIX**  
INTERNET VAULT

Select the device to backup to:  
IV-System Grid

Remote Server:  
n1g9.vaultlogix.com:2430 ( SB )  
Add... Modify... Delete Test

Keep only 10 last successful generations (0 - unlimited)

If backup is not completed in 0 hours, stop and continue the backup next time (0 - unlimited)

☐ Backup ACLs for files Compression level: Default compression

☐ Backup alternate data streams Method of transfer: Block Level Backup

☐ Use initial exported backup for later import Encryption method: BlowFish 64-bit

Your data encryption password will be automatically generated.  
Data is encrypted and compressed before leaving your computer.

< Back Next > Cancel

#### Note:

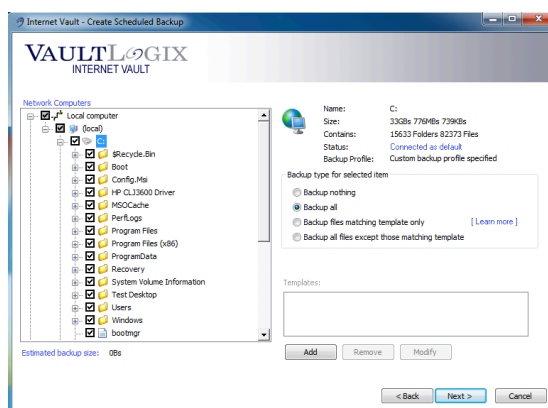
Setting the number of generations to 0 translates to an unlimited number of file versions being kept offsite on the Internet Vault server or locally depending on the type of set you created.



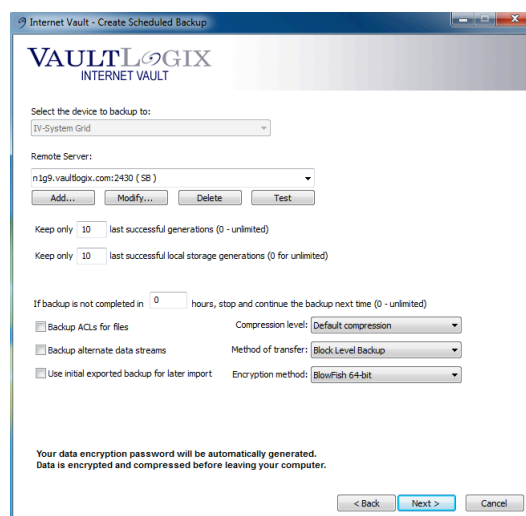
## Creating and Modifying a Backup Set

### Creating a Backup Set

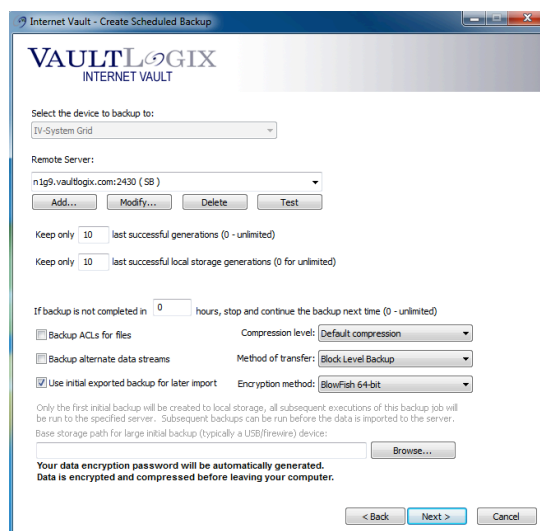
1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Create a New Schedule
3. Choose the backup type and give the job a name
4. Click **Next**
5. Choose any file(s) and folder(s) to be backed up throughout your network
6. Add any appropriate template (Optional. For more details, see **Configuring Templates and Using Templates**)
7. Click **Next**



8. Click **Backup to remote server (no local storage)** (see **Running a Backup to Local Storage** to use the other option)
9. Choose or add the backup server to be used for this backup (See **Registering an IV-Client with the VaultLogix server**)
10. Set your transfer, encryption, ACL's and Alternate Data Streams options (See **Advanced Backup Settings**)



11. Note: If you choose to run a large initial backup to local storage, browse and select the storage location to use. (See **Advanced Backup Settings - Initial Large Backup to Local Disk**)
12. If you choose to span a large initial backup overall several days see, **Spanning a Large Initial Backup**
13. Click Next


**Note:**

After the “first initial backup to local storage” is complete, all subsequent backups of this same profile will be automatically transferred to the offsite server via the Internet, independent of the initial backup’s physical importation into the offsite server. The local drive must be physically shipped by courier to the offsite backup server for importation by its administrator.

This feature saves time between the physical transportation of the local drive and the time it takes to import the backup into the offsite server.

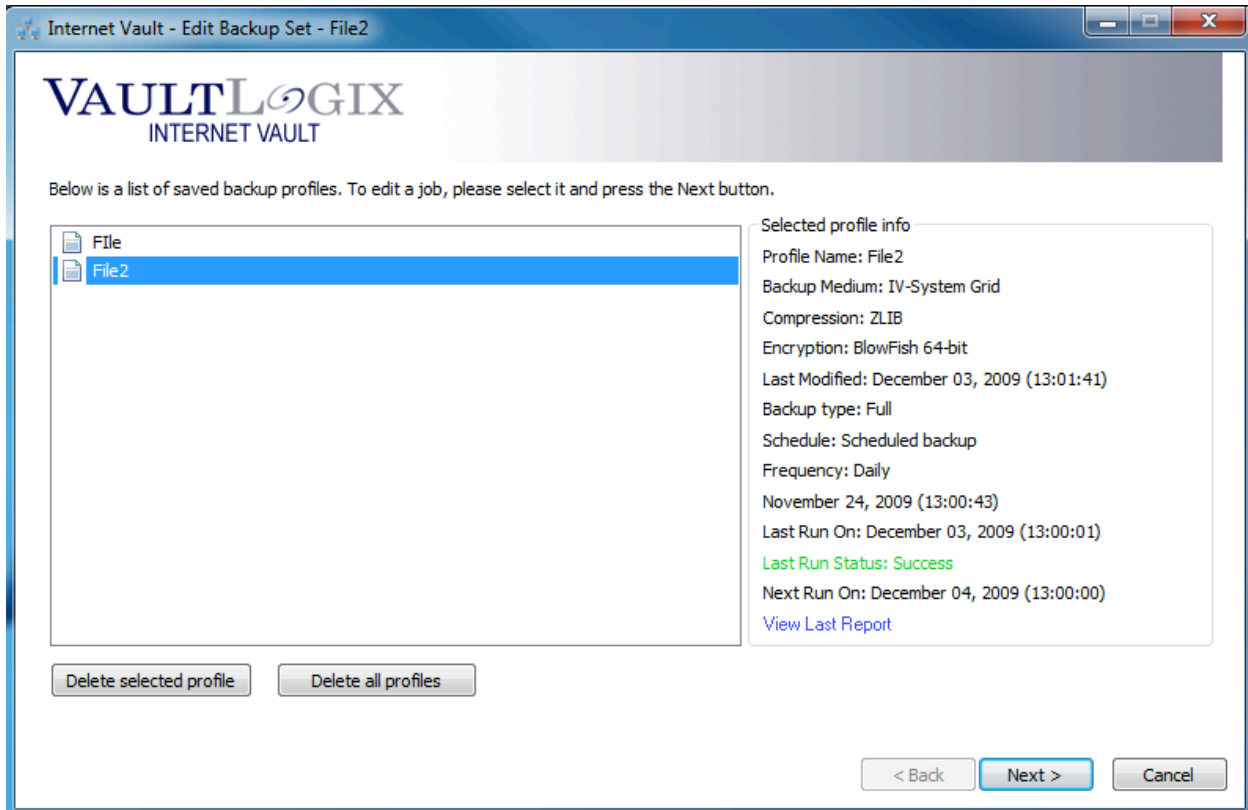
14. Click the desired Log file settings
15. Choose the appropriate email settings (See **Configuring Client Email Notification**)
16. Choose the schedules start time, effective date and frequency.
17. Authentication is also available but not necessary to run LOCAL schedules. (See **Advanced Backup Settings -Authentication** for more information)

**NOTE:** Authentication is REQUIRED when running a backup of a networked machine, UNC path or mapped drive.

18. Click **Finish**

## Modifying a Backup Set

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on **Edit Backup Schedules**
3. Select the backup job you to edit
4. Click **Next**



5. Proceed editing the backup job in the same way you would when creating a backup job (See **Creating a backup job**)

## Running a THIN MSSQL backup

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Create a New Schedule
3. Click Run a New MS SQL Server Backup
4. Click Next

### Note:

#### IMPORTANT: Running your MS SQL backups from an IV-Client on a Win 2000 machine?

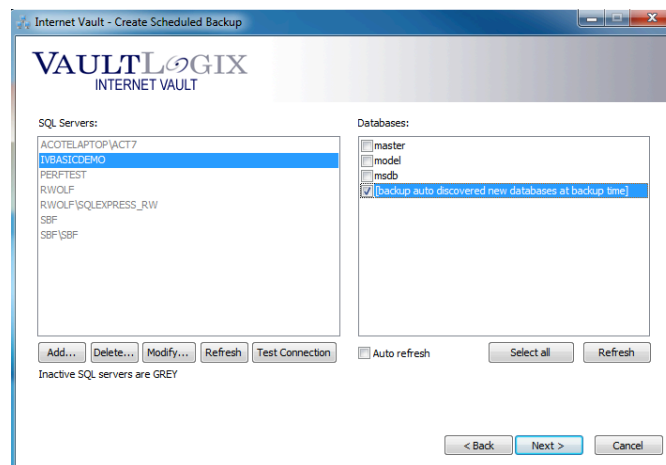
In order to connect to a MS SQL database for an IV-Client running on a Windows 2000 Pro you will need to first download and install the Microsoft Data Access Components located at the following link:

<http://www.microsoft.com/downloads/thankyou.aspx?familyId=6a7d785f-c2e0-471d-a33b-82ad1d514737&displayLang=en>

5. Click the SQL server(s) to backup and Click **Refresh** to list the associated databases

**NOTE:** If you have no SQL servers added, see **Adding a MSSQL Server**

6. Click the databases to backup
7. Click **Next**
8. Choose **Thin differential** or **Thin full** backup (for more information on Differential Backups, see our online FAQ's)

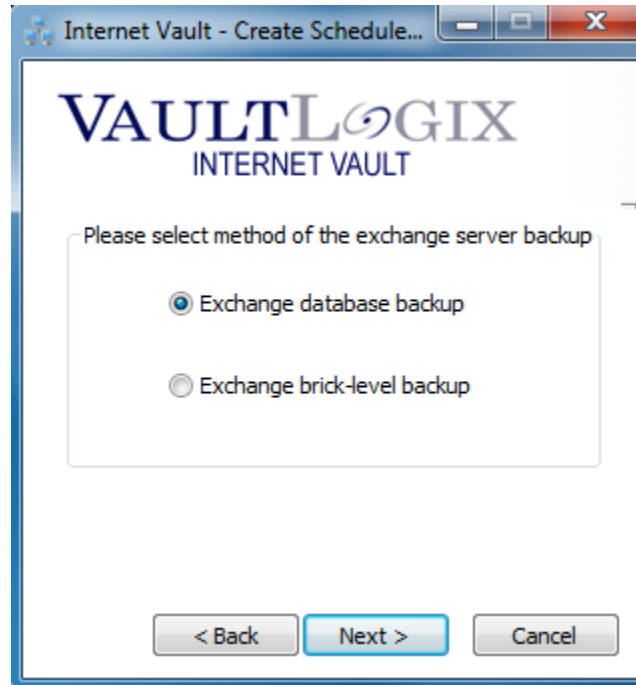


>>**Backup auto discovered new databases at backup time:** Click this option to automatically discover and backup new databases at backup time.

9. Proceed with the backup as normal (see **Creating a Backup Set**)
10. Done

## Running a Thin MS Exchange 2000/2003/2007 Backup

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Create a New Schedule
3. Click Run a New Exchange 2000/2003 Backup
4. Click Next
5. Select MS Exchange database backup
6. Click Next



7. Enter your cluster or computer name and Click **Next**
8. Choose the number of THIN and Full Restore Points of your choice (See **What is a THIN Exchange Backup in the FAQ section of your VaultLogix Customer Portal**)
9. Proceed with the backup as normal (see **Creating a Backup Set**)

## Running a MS Exchange 2003/2007 Mailbox (Brick Level) Backup

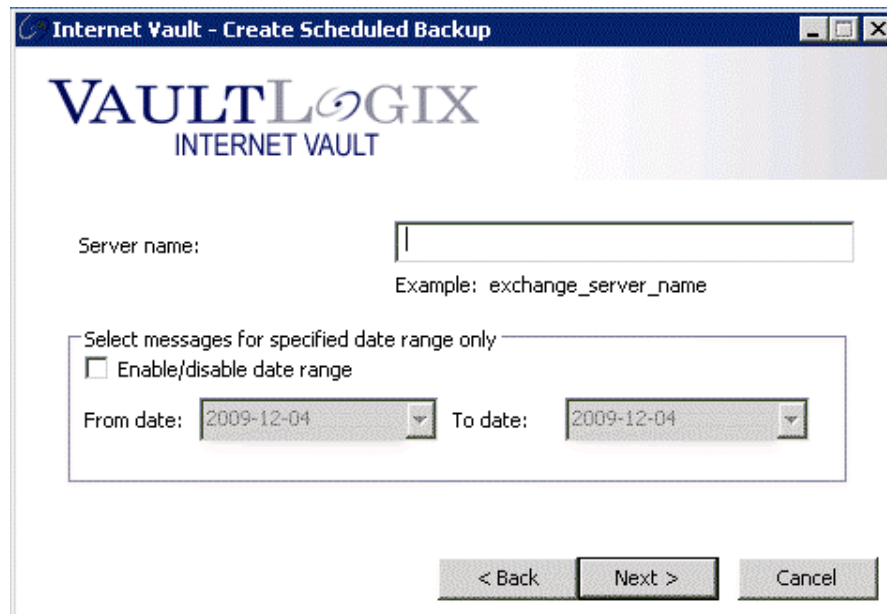
1. To backup individual Exchange mailboxes, select **Exchange brick-level backup**
2. Click **Next**

### Troubleshooting:

Q. When I click Next, I get the following error message: Please include the following path to your Environment variables: <exchange server folder> \bin

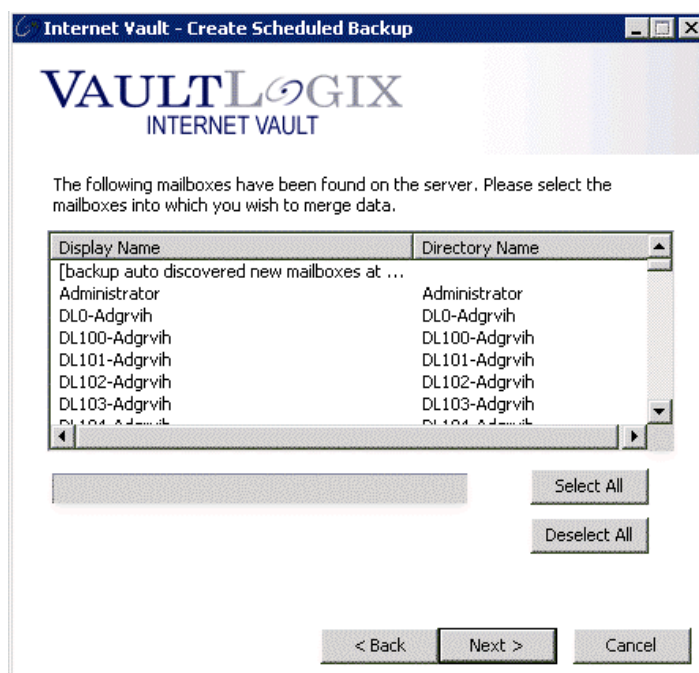
A. See **Adding an Exchange Level Variable** in our online Knowledge bas

3. Fill in the fields below
4. Specify a date range for the backup by enabling the function below (optional)
5. Click **Next**



**Note:** Depending how you are backing up your Exchange 2003/2007 Brick level, Microsoft requires that either Outlook 2003/2007 or the Exchange MAPI Client and Collaboration Data Objects 1.2.1 are installed.

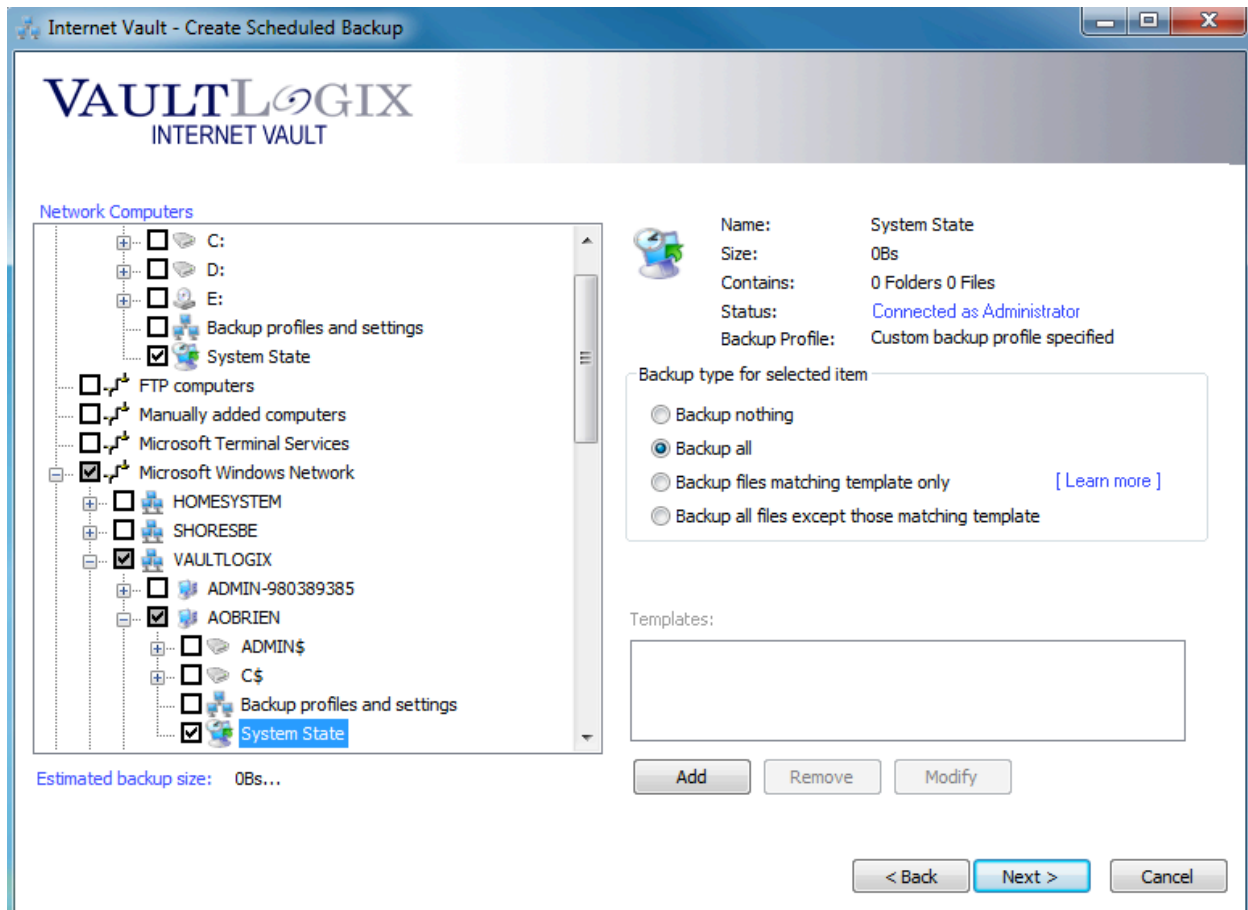
6. Select the mailbox(es) to backup
7. Click **Next**



8. Proceed with the backup as normal (see **Creating a Backup Set**)
9. Done

## Running a Local/Agentless System State/Active Directory Backup

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Create a New Schedule
3. On the file selection screen, Click the **System State** plug-in icon under the local machine or on a networked machine



4. Proceed with the backup as usual (see **Creating a Backup Set**)
5. Done

**NOTE:** System State backups are only supported on XP or above while Active Directory backups are only valid on Win 2003 server and above

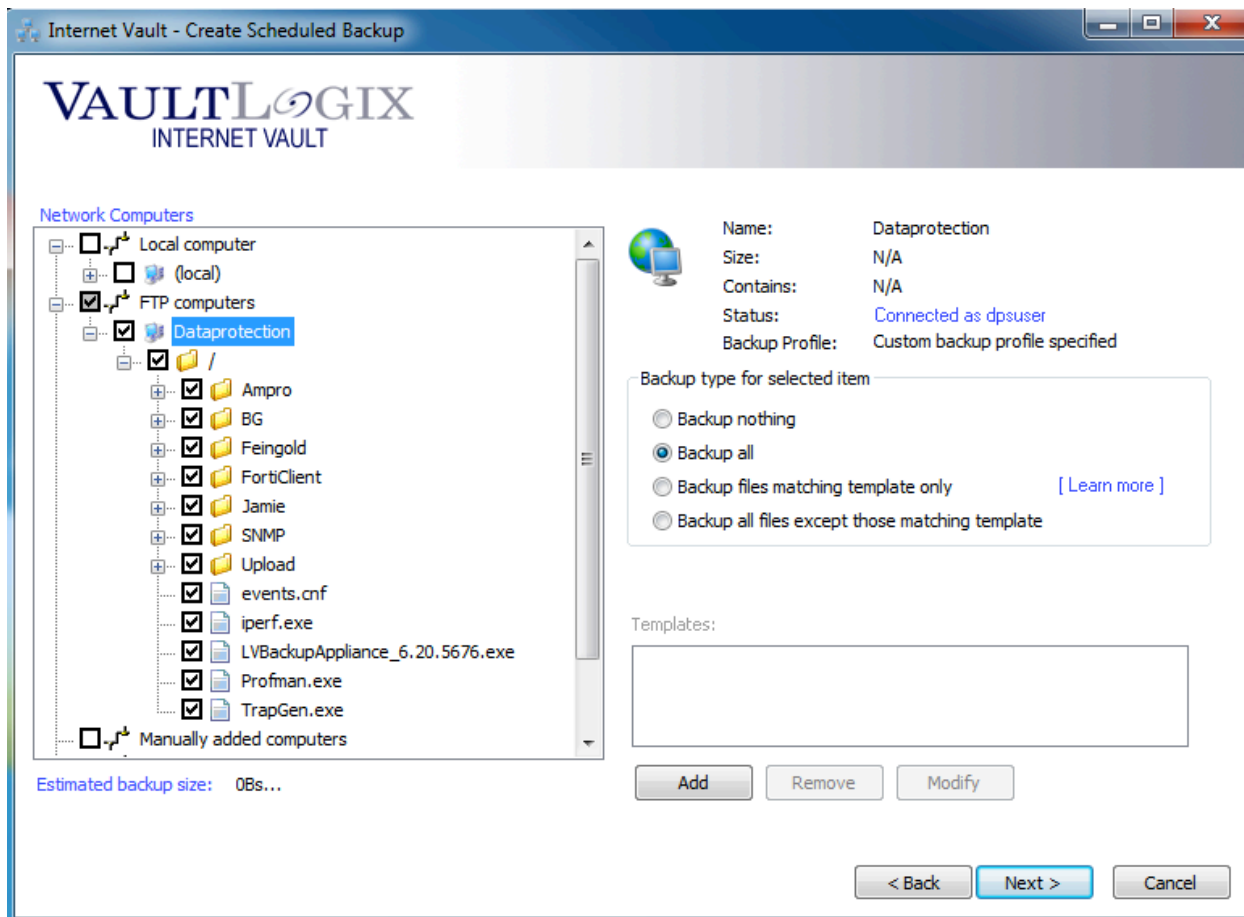


## Running a Backup via FTP/SFTP/FTPS (Windows, MAC, Linux, etc...)

**NOTE:** See **Adding an FTP/SFTP/FTPS server** for registering remote machines.

1. Run a backup as normal (see **Creating a Backup Set**)
2. At the file selection tree expand the remote machine under **FTP computers**

**NOTE:** To connect to the machine Click **Not Connected (Click to Connect)** (next to Status on the right hand side) and Enter an administrative username and password.



3. Proceed with the backup as normal (see **Creating a Backup Set**)
4. Done

## Running a Backup to Local Storage

**Note:** Running a Backup to Local Storage is different from running an initial large backup to USB. Local storage allows you to keep a local copy of your data onsite for faster restore times in non critical situations while initial large backups to USB allow you to move large amounts of data by physically shipping the data via a USB disk to the server thus avoiding bandwidth bottlenecks.

1. **Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault**
2. Click on **Create a New Schedule**
3. Select the files to backup and Click **Next**
4. Select **Backup to local storage and sync to remote storage**
5. Select the appropriate offsite backup server
6. Specify the number of generations to keep locally and how many generations to keep remotely
7. Specify the frequency of the schedule for the replication function
8. Specify your notifications
9. Specify the frequency of the schedule for the local storage backup (if applicable)
10. Done

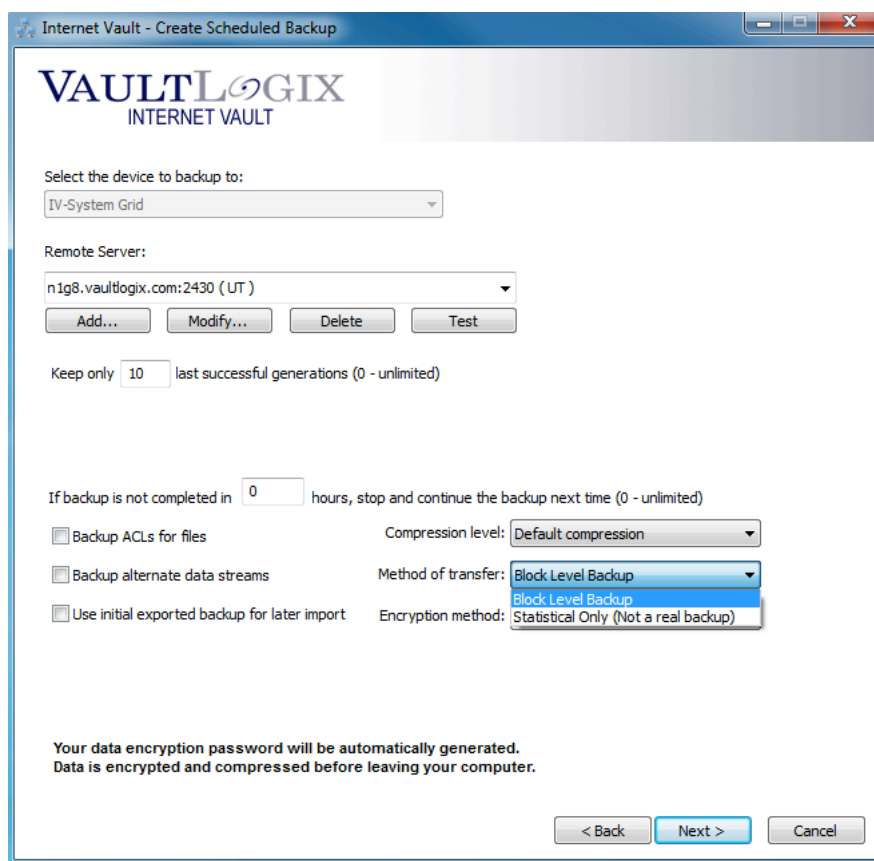
**NOTE:** To change the location of the local storage, go into the VaultLogix IV-Client, Click General Settings and change the path under “Enter the location to store local data”.

## Running a Statistical Backup

Statistical backup data can be generated to determine the data backup usage and trends before performing an actual backup. You will need to have registered your IV-Client with the VaultLogix server (see **Registering an IV-Client with a VaultLogix server**) as a connection will be made to determine which files will need to be transferred (see **de-duplication**), space used and total size of the backup set. Statistical data is gathered and stored in a report (see **Viewing Reports Listed by Backup Job**).

**NOTE:** You can not restore or convert a statistical backup to a true backup set.

1. Proceed with Running a Backup until you reach the server selection screen (see **Running a Backup**)
2. Choose **Statistical Block Level Backup** From the **Method of transfer** drop down menu



3. Proceed with the backup as normal (see **Creating a Backup Set**)
4. Done

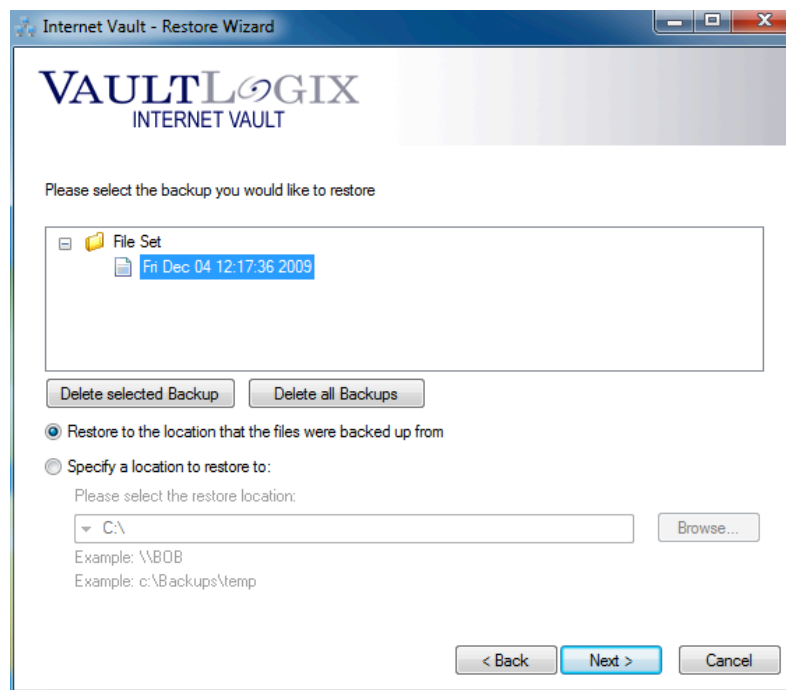
## Deleting Backup Jobs and Online Vault Files

### Deleting Online Vault Files

To physically delete a backup profile from your online vault you must first mark it for deletion from your IV-Client.

1. **Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault**
2. Click on **Restore Backup**
3. Choose from one of the listed restore options
4. Click **Next**
5. Click **Delete selected Backup**
6. Done

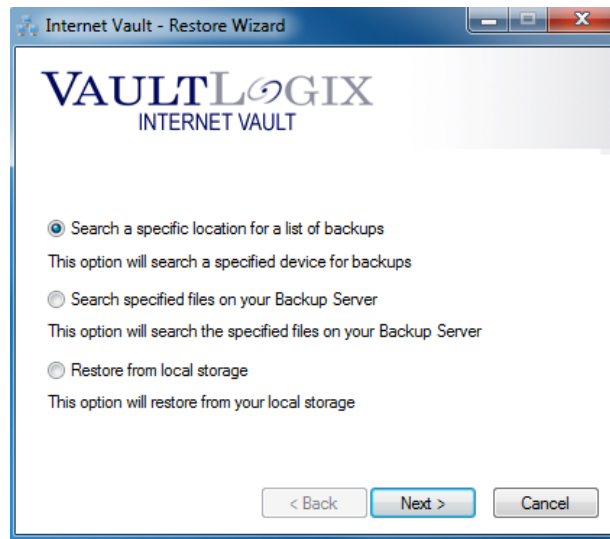
**NOTE:** To delete all backups from your online vault, Click **Delete all Backups**



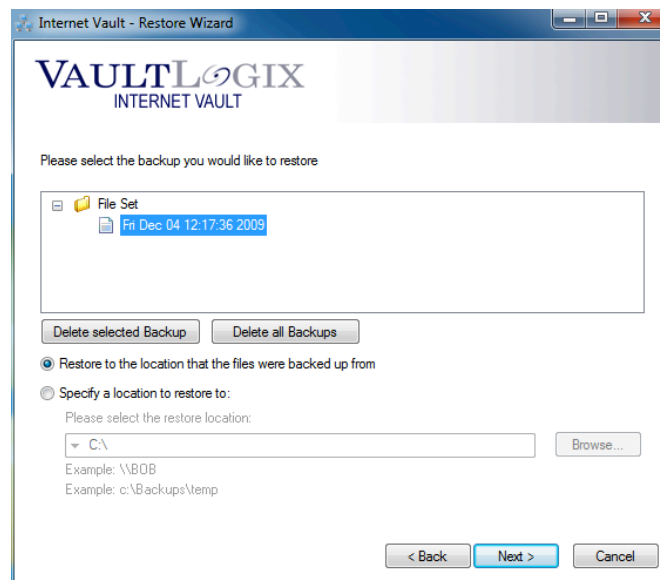
## Restoring Backups

### Restoring - Search a Specific Location for a List of Backups

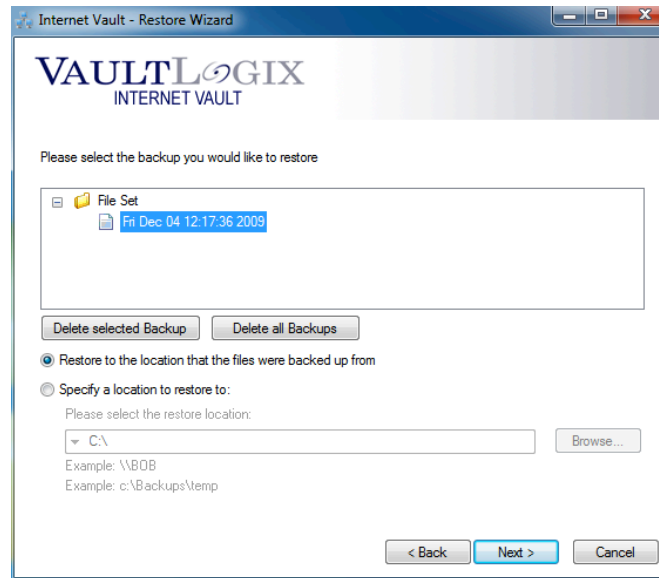
1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click Restore Backup
3. Click Search a Specific location for a list of backups
4. Click Next



5. Select the VaultLogix server to restore from
6. Click the + sign for the backup you'd like to restore

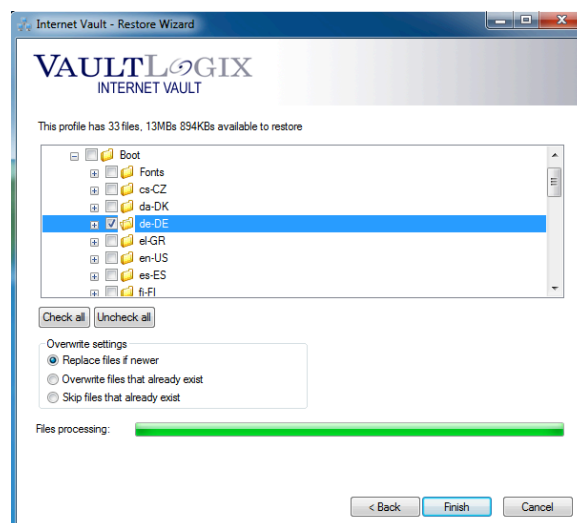


7. Click the particular backup you'd like to restore


**Note:**

Each backup will also have at least one backup date associated with it. To restore a backup, you must not only select the backup, name, but the backup date as well.

8. Specify the restore location for the backup
9. Click **Next**
10. Select the files to restore
11. Choose the appropriate options (See **Advanced Restore Options**)
12. Click **Next**

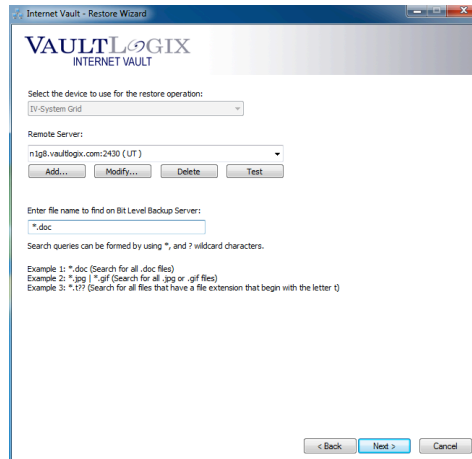


13. Click **Finish** after the restore has run
14. Done

## Restoring- Search Specified Files on a VaultLogix Backup Server

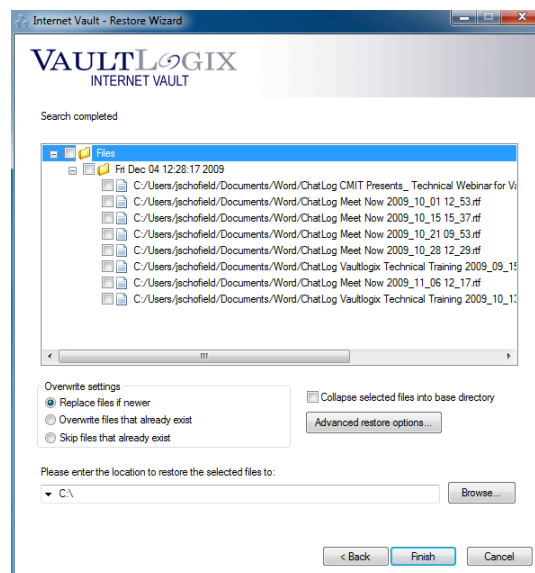
This quick restore option searches throughout all your backups by file name or extension.

1. Click **Restore Backup** from the main menu
2. Click **Search Specified Files on a Bit Level Backup Server**
3. Choose the specific VaultLogix server and enter your search criteria



**NOTE:** For example to search the server for all text files, type **\*.txt** (VaultLogix is Regular Expressions friendly) and to find file(s) matching the word Accounting, enter **Accounting**.

4. Select the file(s) and the restore location and Click Next



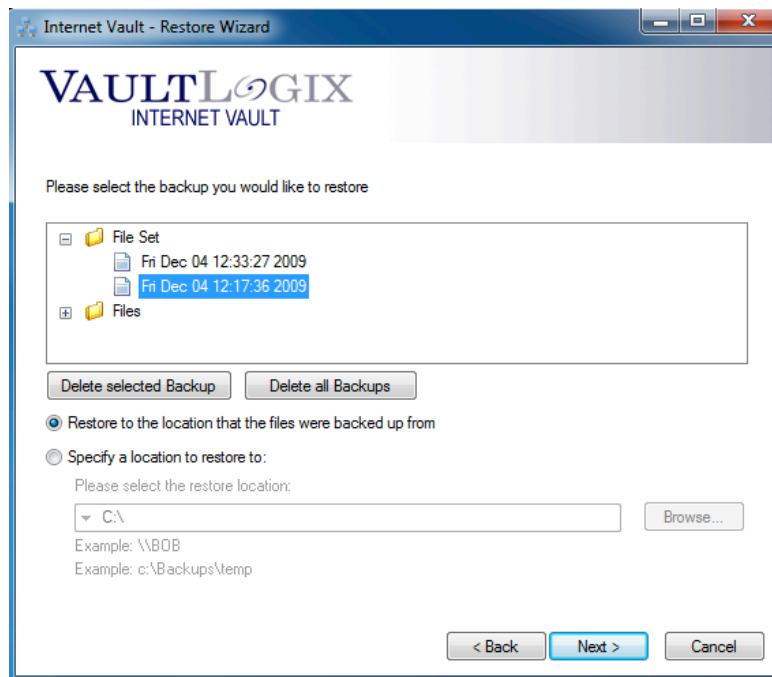
5. Proceed with the restore process as normal (see **Restoring - Search a Specific location for a list of backups**)
6. Done

## Restoring a Generation of a Backup Profile

1. Proceed with the restore as normal until you get to the below screen (see **Restoring - Search a Specific location for a list of backups**)
2. Choose the generation to restore

**NOTE:** It is NOT necessary to restore prior generations. See below example for more detail.

3. Click **Specify a location to restore to**
4. Click **Next**



5. Type in or Browse to the desired location
6. Click **OK**
7. Proceed with the restore as normal (see **Restoring from a List of Known Backups**)
8. Done

### Restore Example:

Day 1 - You backup a directory with 1000 files and name it *Backup A*

Day 2 - Backup A runs again on the same directory with 1000 files and only backs up 50 of the files because they've changed (note: Internet Vault only backs up delta blocks that have changed as we perform common block elimination)

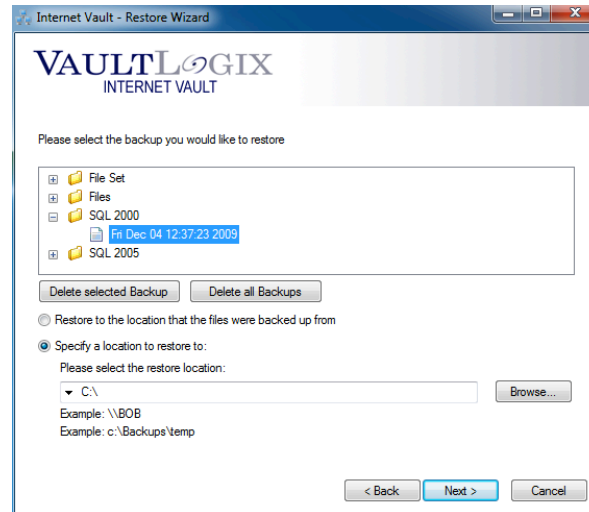
Day 3 - You run Backup A once again and only 7 files have changed

Day 4 - You want to restore the entire directory as it was on Day 3. You would simply restore the generation that was created on Day 3 without having to first restore Day 1 and day 2.



## Restoring a MSSQL 2000 Backup

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on **Restore Backup**
3. Select **Search a specific location for a list of backups**
4. Click **Next**
5. Click the SQL backup you'd like to restore



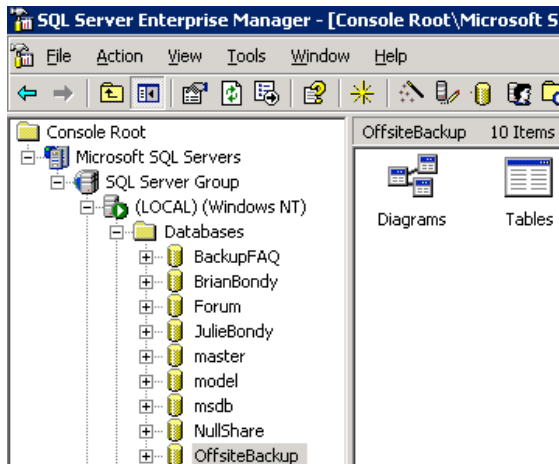
6. Click **Specify a location to restore to**
7. Type in or browse to the desired restore location (e.g. C:\temp)

### Note:

As the restored backup will have to be manually imported by SQL Enterprise Manager, it is not necessary to restore it to a "permanent" location.

8. The SQL backup will be restored to the location you specified on the restore window
9. Browse to the location specified by the restore window
10. Click Start > Programs > Microsoft SQL Server > Enterprise Manager

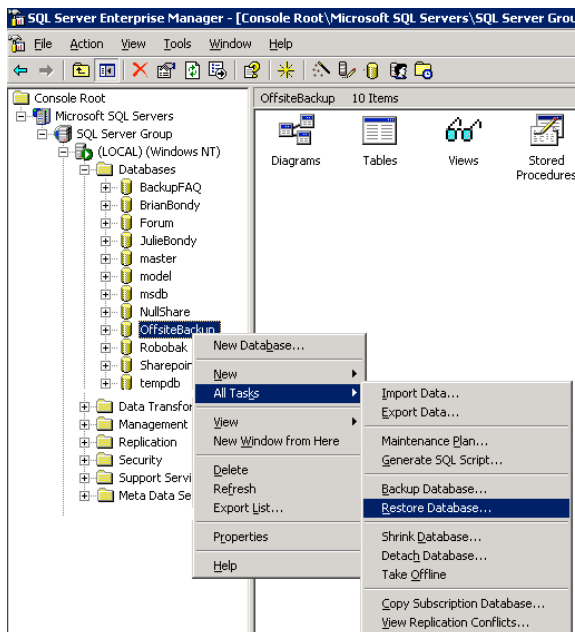
## 11. Expand the Server



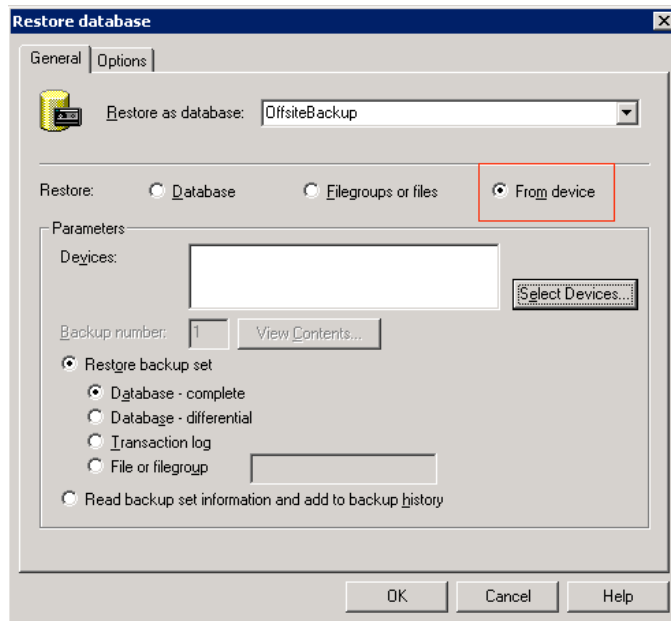
## 12. Right Click the Database that you'd like to restore

## 13. Click All Tasks

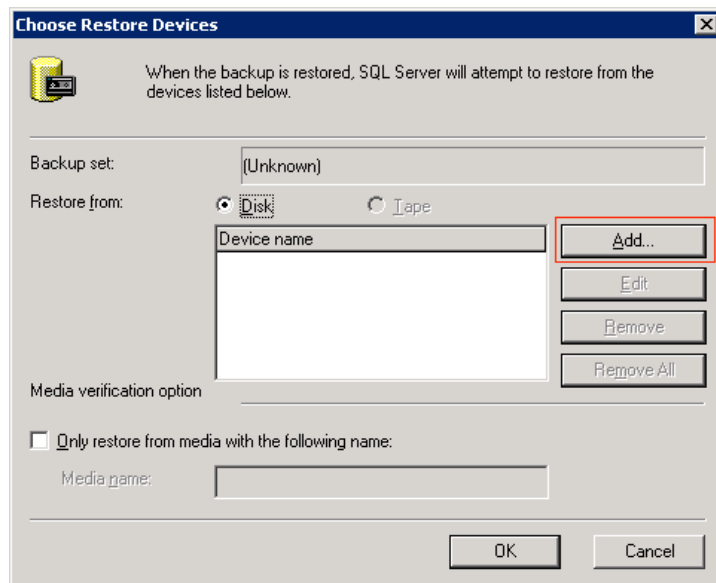
## 14. Click Restore Database



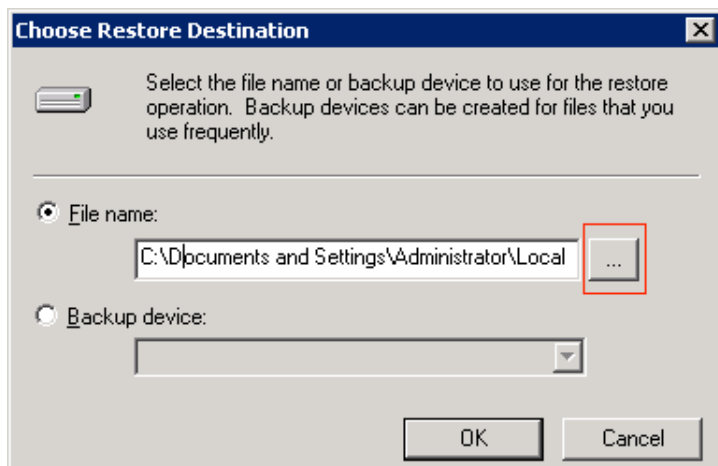
15. Click From device
16. Click Select Devices



17. Click Add



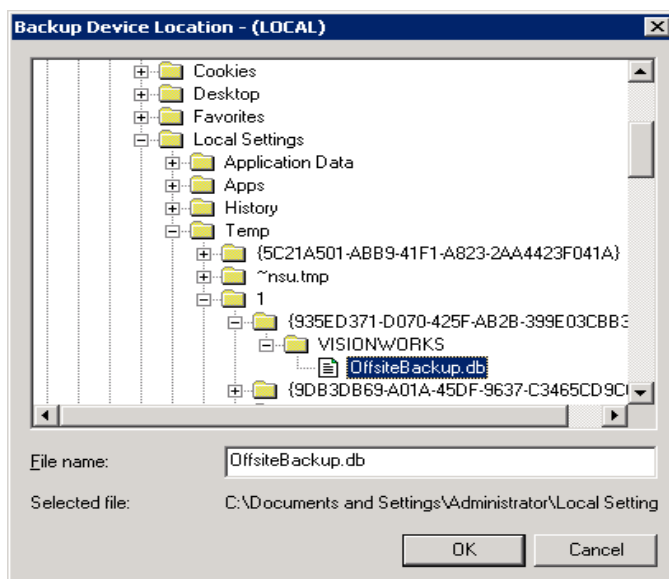
### 18. Click Browse



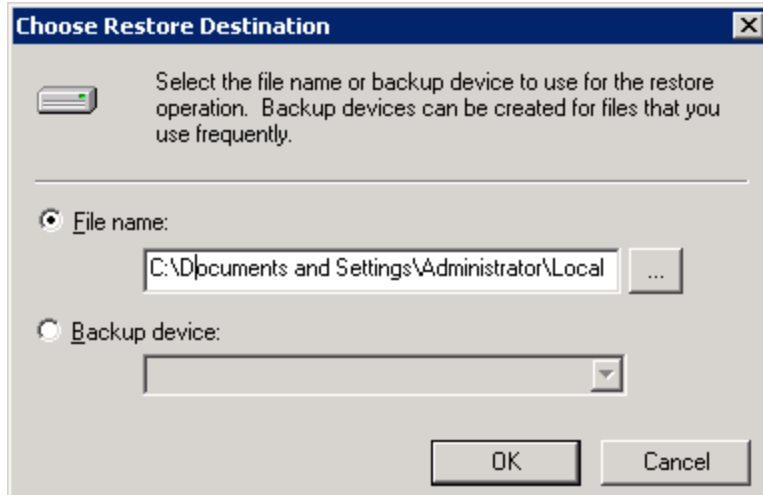
### 19. Browse to the location of your restored backup

### 20. Click on the .db file

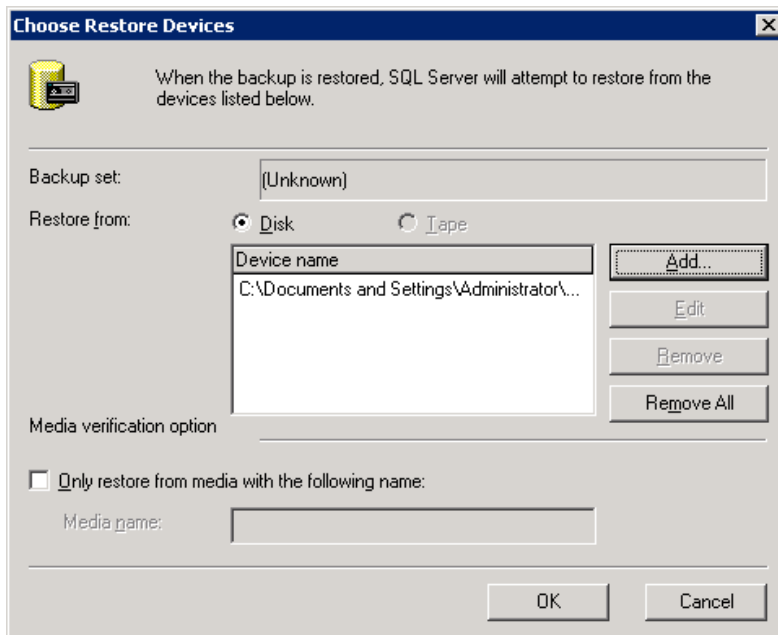
### 21. Click OK



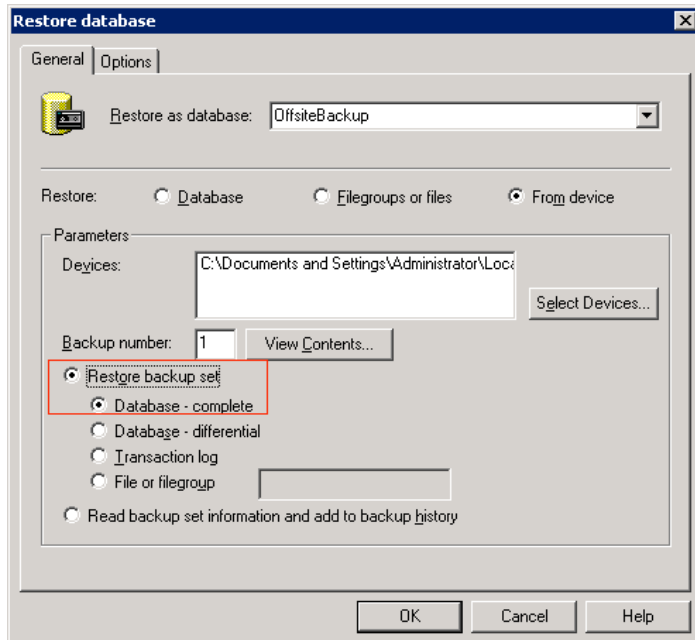
### 22. Click OK again



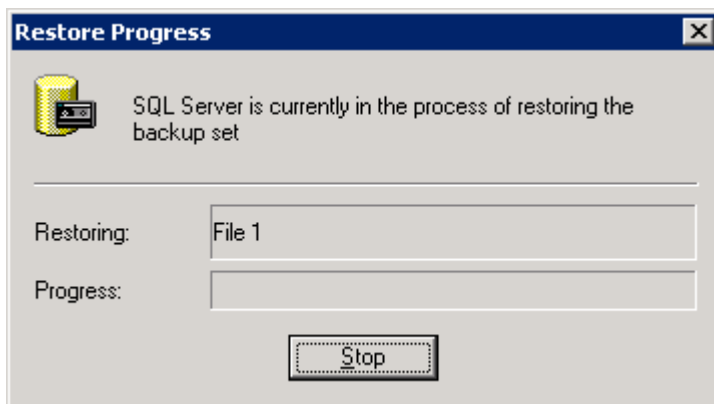
23. Click **OK** again



- 24. Click **Restore backup set**
- 25. Click **Database - complete**
- 26. Click **OK**



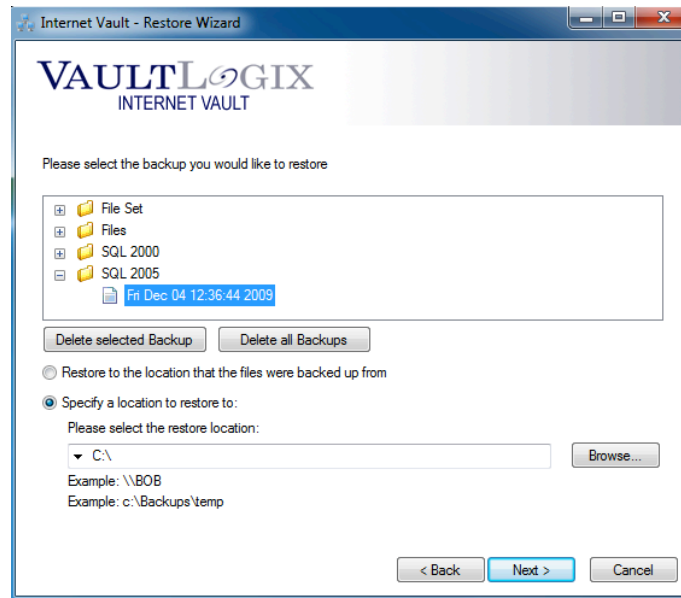
27. The restore process will begin. When it is finished, Click OK.



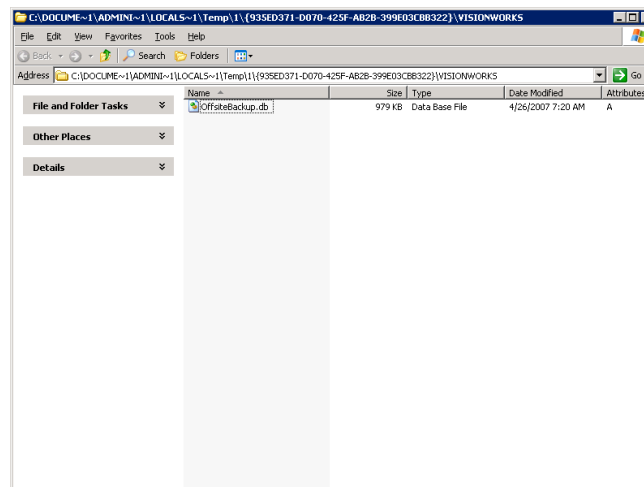
28. Done

## Restoring a MSSQL 2005/2008 Backup

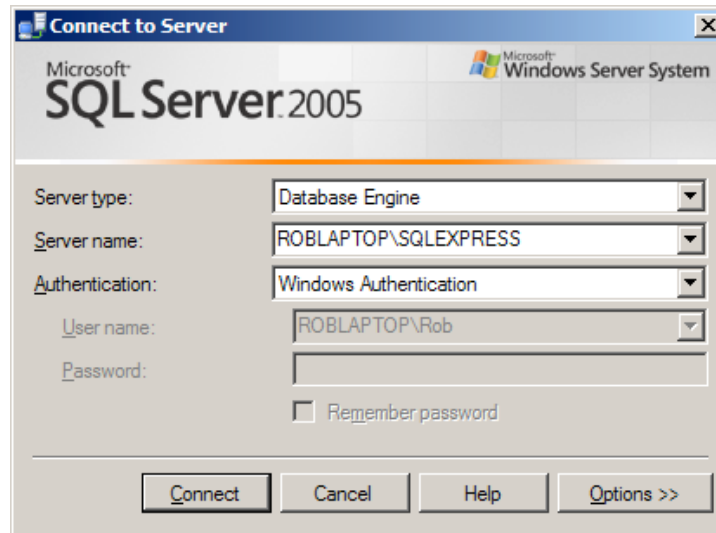
1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Restore Backup
3. Select Search a specific location for a list of backups
4. Click Next
5. Click the SQL backup you'd like to restore



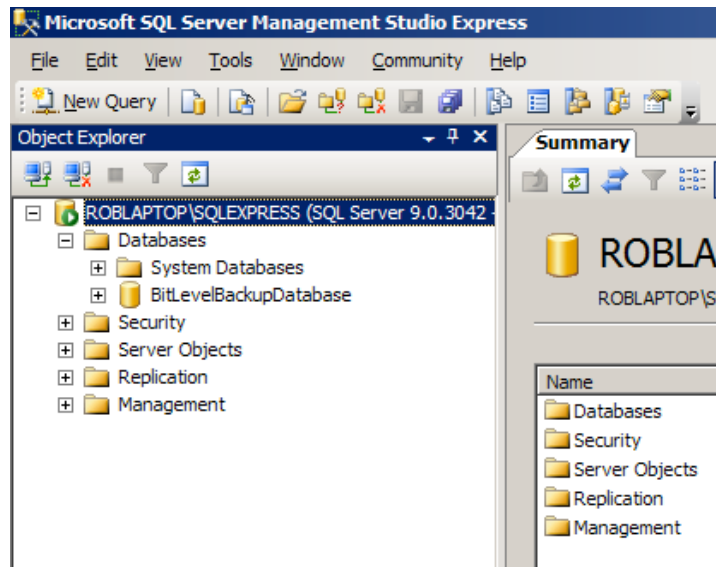
6. Click Specify a location to restore to
7. Type in or browse to the desired restore location (e.g. C:\temp)
8. The SQL backup will be restored to the location you specified on the restore window
9. Browse to the location specified by the restore window



10. Click **Start > Programs > Microsoft SQL Server 2005 > SQL Server Management Studio**
11. Click to **Connect** to the desired Server

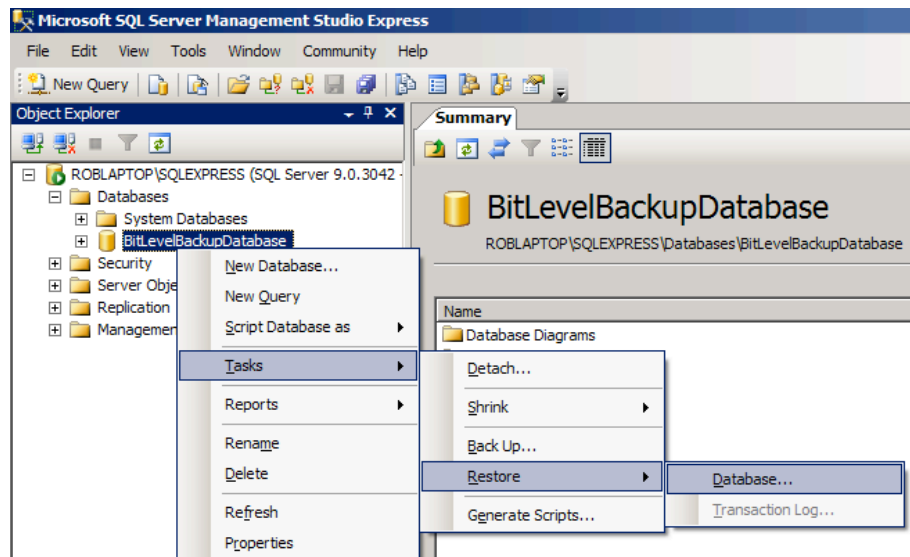


12. Expand **Databases**

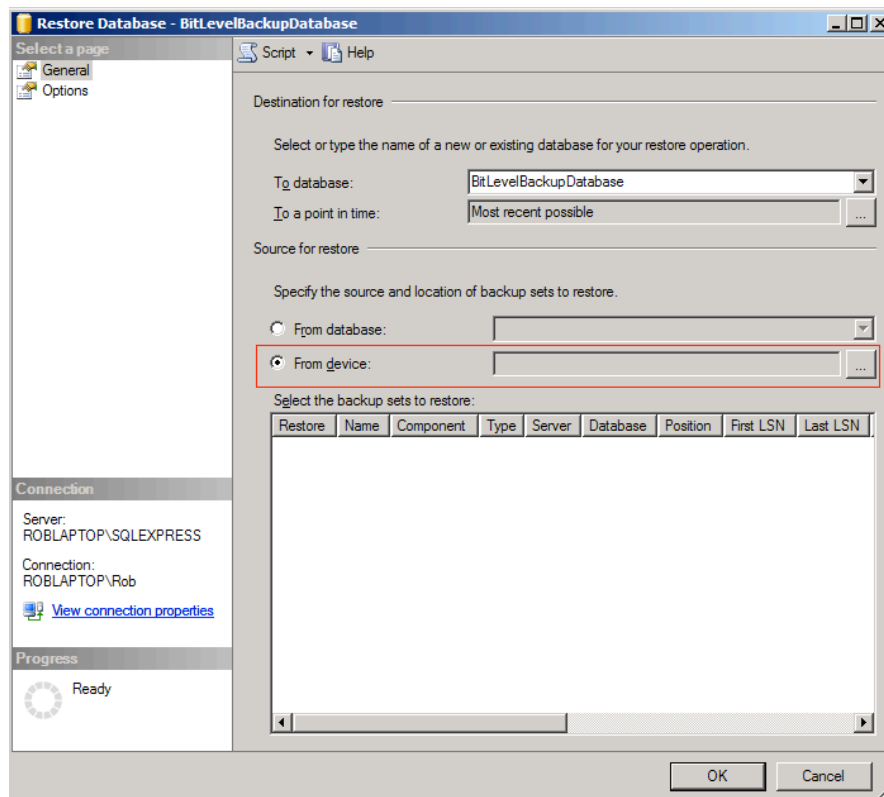




13. Right Click the desired database and Click **Task > Restore > Database**



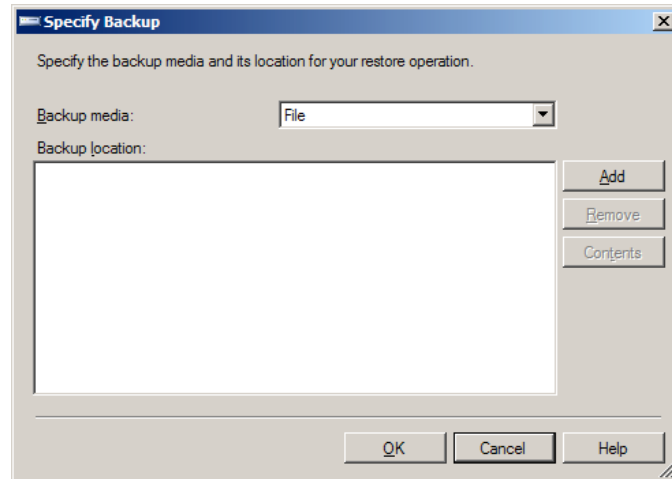
14. Under **Source for Restore** Click **From device**



15. Click the browse button (...)

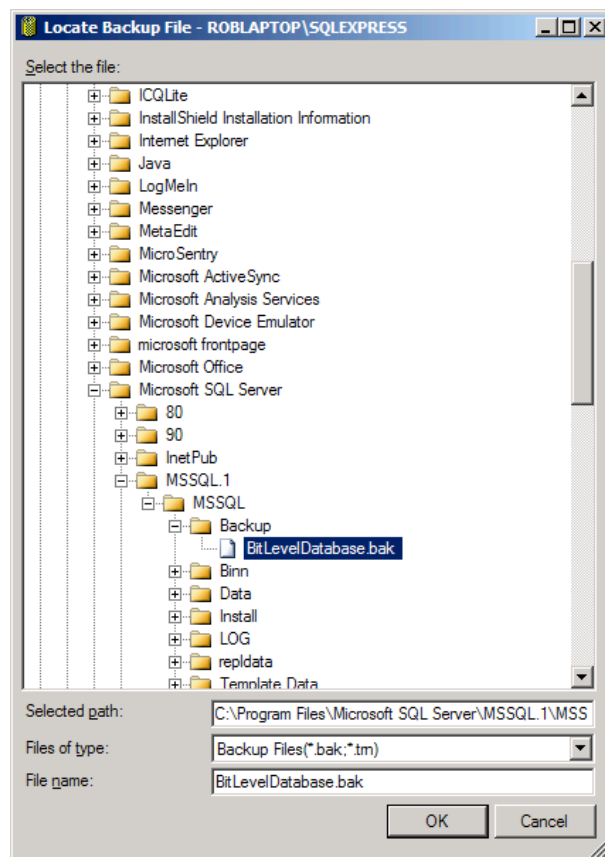


16. Click the **Add** button



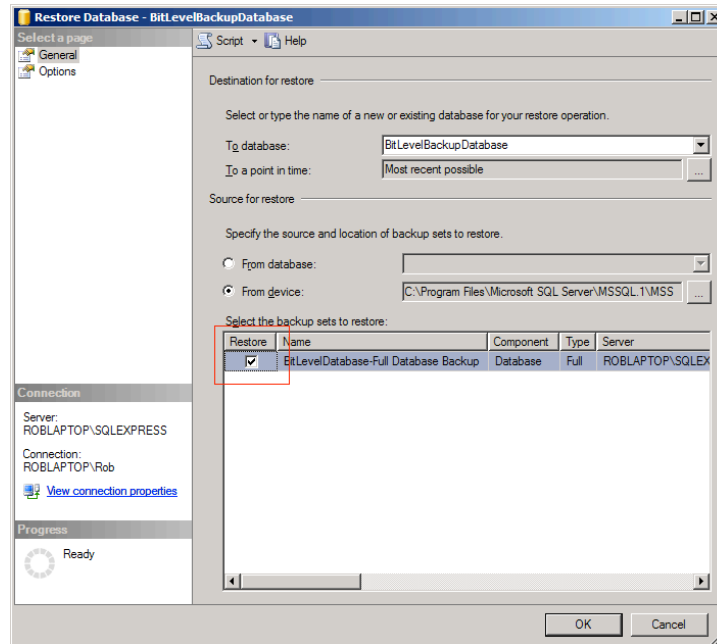
17. Browse to the location of the restored database file(s)

**NOTE:** If using THIN Differential to backup MSSQL, you will have to select two files to import. The file extensions will be .bak and \_diff.bak.



18. Click **OK** > **OK**

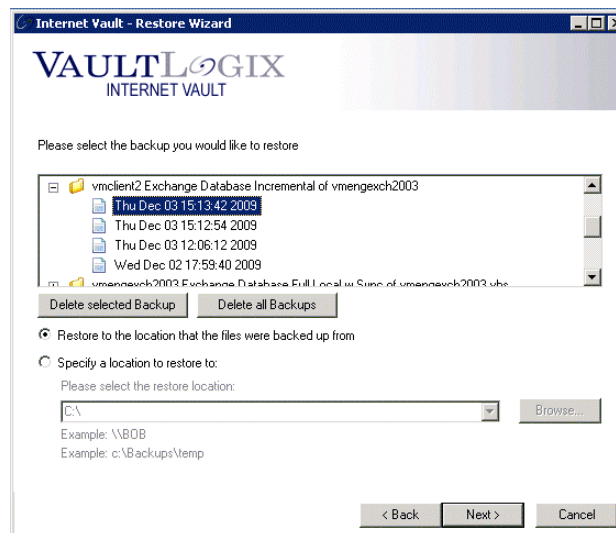
19. Click on the check box under **Restore** and Click **OK**



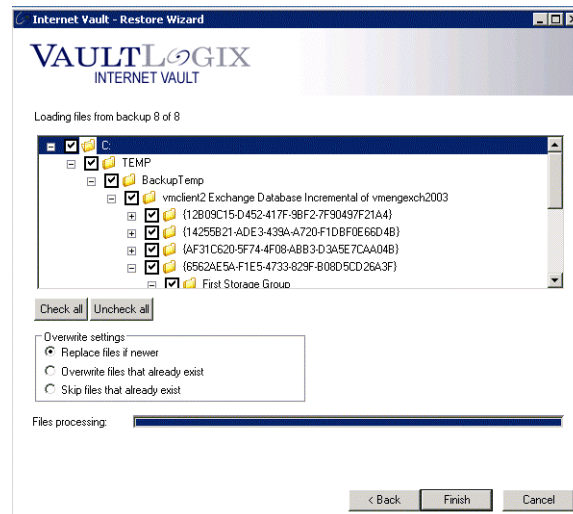
20. Done

## Restoring a Full MS Exchange Database

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Restore Backup
3. Select Restoring - Search a Specific location for a list of backups
4. Click Next
5. Select the MS Exchange Backup that you'd like to restore
6. Click Restore to the location that the files were backed up from



7. Select ALL the files in the backup and Click Next

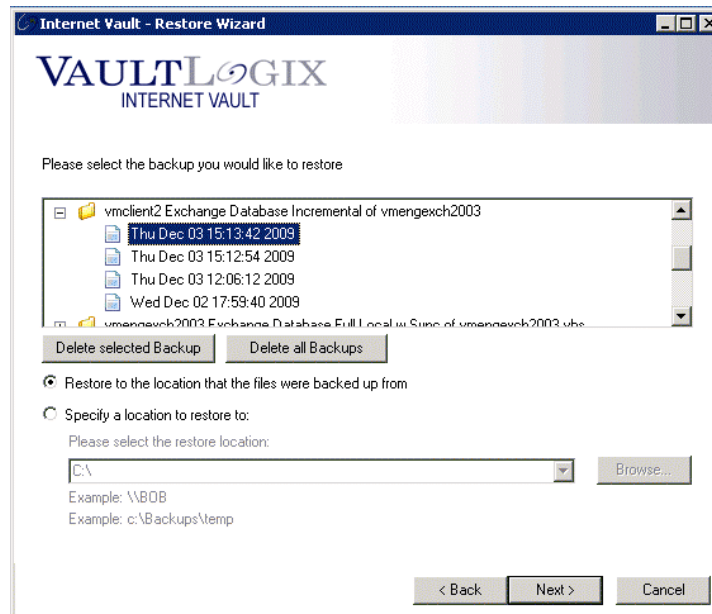


8. The Restore will proceed as normal
9. Done

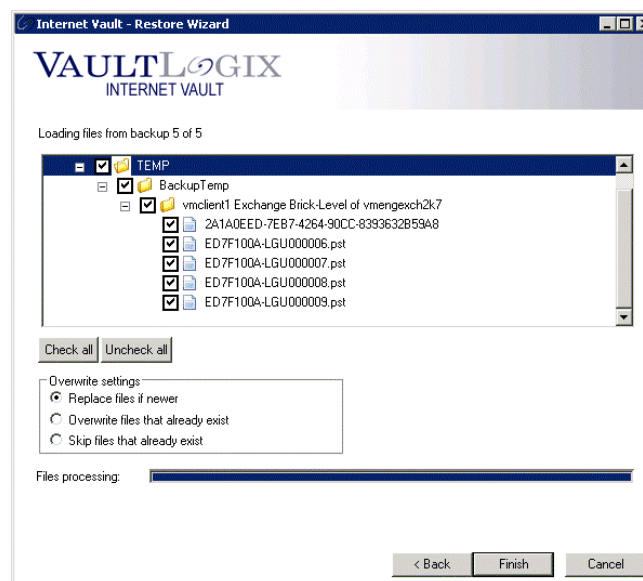
**NOTE: The IV-Client must be on the same server as the MS Exchange server at the time of restore**

## Restoring a Mailbox Level MS Exchange Backup

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on **Restore Backup**
3. Select **Restoring - Search a Specific location for a list of backups**
4. Click **Next**
5. Select the MS Exchange Mail Level Backup (Brick level) that you'd like to restore



6. Select **ALL** the files in the backup and Click **Next**



7. The Restore will proceed as normal (see **Restoring a Full MS Exchange Database**)

**NOTE:** The IV-Client must be on the same server as the MS Exchange server if restoring to the original location (Overwriting the current MS Exchange files)

## Restoring System State

1. Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault
2. Click on Restore Backup
3. Select Restoring - Search a Specific location for a list of backups
4. See VaultLogix's online FAQ for specific instruction as it is specific per O/S

## Restoring Active Directory on Windows 2003 or above

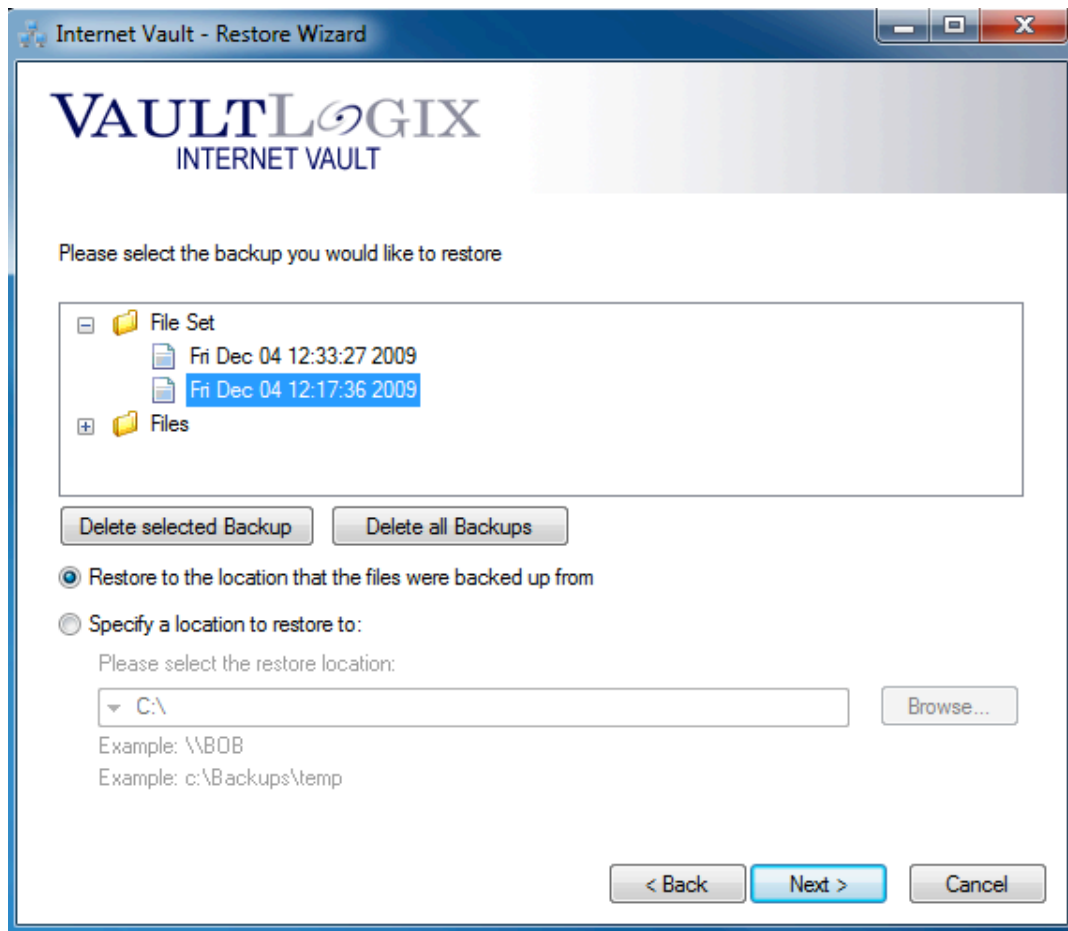
1. Restart the machine and enter the boot menu (Most commonly entered by clicking the F8 key)
2. Select the Active Directory safe mode boot option
3. Once entered into Windows safe mode, open the IV-Client and restore like usual (see **Restoring- Search a Specific Location for a List Known Backups**)

**NOTE:** See VaultLogix's online FAQ for specific instruction as it is specific per O/S



## Restoring a FTP/SFTP/FTPS Backup (Windows, MAC, Linux, etc...)

1. Proceed with the restore as normal (see **Restoring - Search a Specific location for a list of backups**)
2. **Important:** Select **Specify a location to restore to:** as the **Restore to the location that the files were backed up from** is NOT valid for FTP/SFTP/FTPS backups.



3. Proceed with the rest of the restore as normal (see **Restoring - Search a Specific location for a list of backups**)
4. Manually move the restored data from the source, the specified restore location, to the destination drive, the machine that you're restoring.
5. Done

## Restoring from Local Storage

Local storage allows you to keep a local copy of your data onsite for faster restore times in non critical situations. The Local Restore option is available on the backup server selection screen (see **Running a Backup to Local Storage**)

1. **Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault**
2. Click **Restore Backup**
3. Click **Restore from Local Storage**
4. Select the files/folders to restore and proceed with the restore as usual (see **Restoring - Search a Specific location for a list of backups**)
5. Done

## **Restoring from the Web (Customer Management Console)**

See the **Customer Management Console** section of this document for all details including how to restore using your web browser.

## **Restoring using Command Line Parameters**

For more information on using Command Line Parameters for Restore, please see our Frequently Asked Questions section in your VaultLogix Customer Portal.

## Customer Management Console

The customer Management Console is your personal management console used to view your backup stats, change personal information and even restore using a web browser from anywhere in the world.

## Accessing the Customer Management Console

Your customer management console is accessed by navigating to a specific http path with your web browser. This http path will be given to you by your server's administrator and can be accessed using the same user name/password that you use to backup with.

## Restoring from the Customer Management Console (web)

1. On the main page Click **Backup/Restores > Backup Sets**
2. Choose the Profile Name and Click **View Versions**
3. Now Click **View Files**
4. Expand the tree to file that you'd like to restore
5. Double Click the file on the right hand side of the screen
6. Click **Save as** from the new dialogue window that will appear after the server has assembled the file
7. Done

## Changing Your Account Information

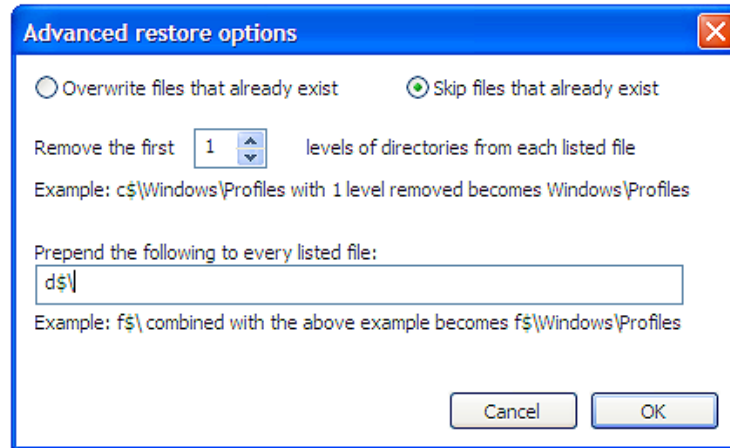
1. From the Customer Management Console Click **Account > Account Information**
2. From here you can change your address and password etc...
3. Done

## Advanced Backup and Recovery

### Advanced Restore Options

During the process of restoring backups, you are offered several optional advanced restore options.

1. Proceed with the restore as normal until you get to the below screen (see **Restoring - Search a Specific location for a list of backups**)
2. Click **Advanced restore options**



>>Overwrite files that already exist: This option will replace all existing files with the new restored files.

>>Skip files that already exist: This option will skip the restore of files that already exist at the restore location.

>>Remove the first “x” levels of directories from each listed file: This option will remove “x” number of hierarchical levels from the restored files

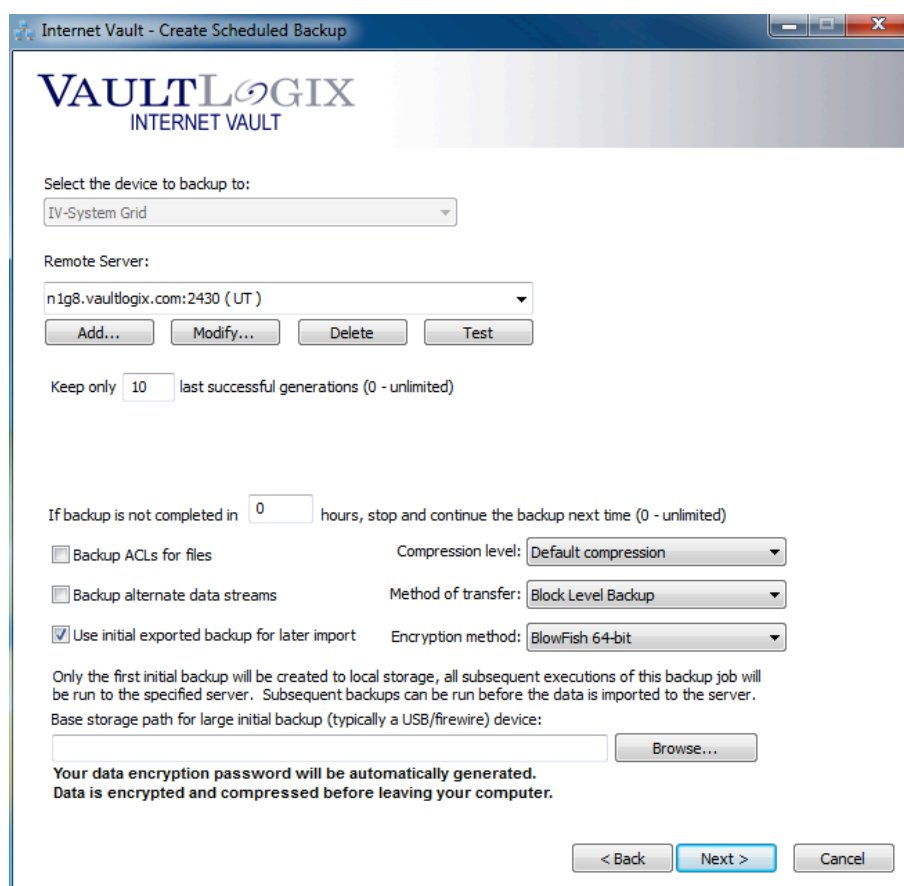
>>Pre-pend the following to every listed file: Pre-pending directory levels allows you to alter the path of the restore. You can send it to another server or simply to another directory. Combined with removing directory levels, you can change the path of restore files as needed.

## Initial Large Backup to Local USB Disk

When running a large backup for the first time, you may find it advantageous to first run your initial large backup to local USB storage and then ship the drive via courier to your offsite server's administrator for him/her to import. This will avoid bandwidth bottlenecks or having to span a large initial backup over multiple days. (see **Spanning a Large Initial Backup**)

After completing the first time large initial backup to local storage, you'll be free to continue running backups directly to the offsite server even if the administrator has not yet imported your data in.

- 1) **Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault**
- 2) Click on **Create a New Schedule**
- 3) **Choose** any file(s) and folder(s) to be backed up throughout your network
- 4) At the server selection screen, Click **Use initial exported backup for later import**



Internet Vault - Create Scheduled Backup

**VAULTLOGIX**  
INTERNET VAULT

Select the device to backup to:  
IV-System Grid

Remote Server:  
n1g8.vaultlogix.com:2430 (UT)

Add... Modify... Delete Test

Keep only 10 last successful generations (0 - unlimited)

If backup is not completed in 0 hours, stop and continue the backup next time (0 - unlimited)

☐ Backup ACLs for files Compression level: Default compression

☐ Backup alternate data streams Method of transfer: Block Level Backup

☒ Use initial exported backup for later import Encryption method: BlowFish 64-bit

Only the first initial backup will be created to local storage, all subsequent executions of this backup job will be run to the specified server. Subsequent backups can be run before the data is imported to the server.

Base storage path for large initial backup (typically a USB/firewire) device:

Browse...

Your data encryption password will be automatically generated.  
Data is encrypted and compressed before leaving your computer.

< Back Next > Cancel

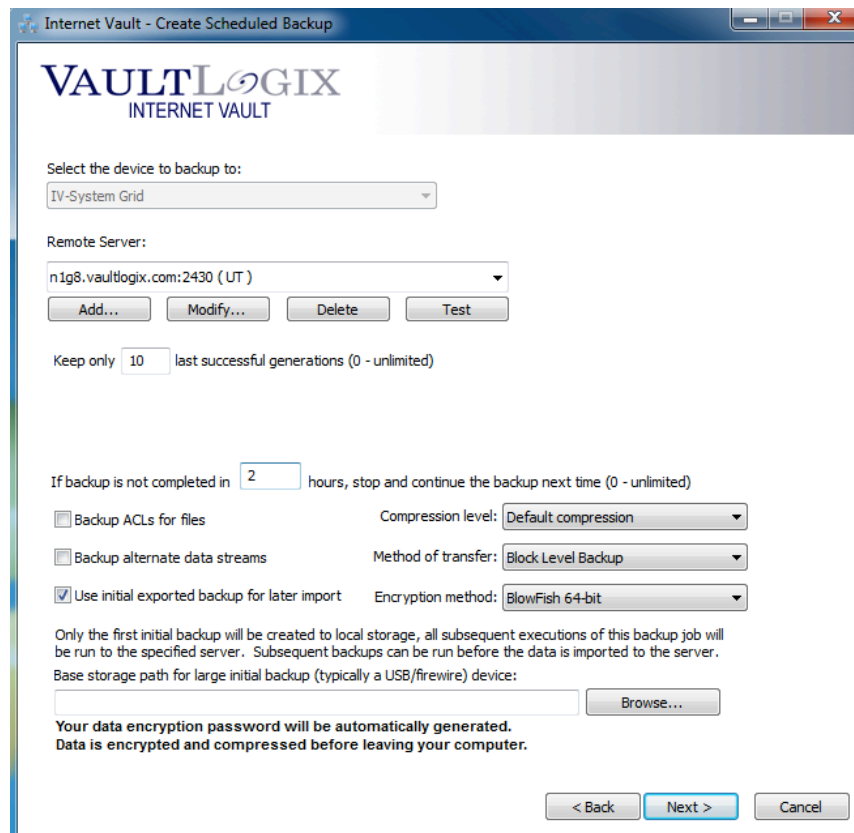
- 5) Browse to the backup location
- 6) Click **OK**
- 7) Proceed with the backup as normal
- 8) Once the backup job is complete, send the drive via courier to your offsite server's administrator so that he/she may import it directly into the offsite server
- 9) Done

## Spanning a Large Initial Backup

The Spanning a large initial backup function is used to span an initial large amount of data over several days to avoid bandwidth slowdowns during peak operations times.

1. **Start > Programs > VaultLogix Internet Vault > VaultLogix Internet Vault**
2. Click on **Create a New Schedule**
3. **Choose** any file(s) and folder(s) to be backed up throughout your network
4. At the server selection screen below, input the number of minutes that you'd like to run the backup for.

**NOTE:** In the example below, Spanning is set to (2hours). After the 2 hours have expired, the backup will automatically stop and rerun where it left off on the schedule's frequency.



Internet Vault - Create Scheduled Backup

VAULTLOGIX  
INTERNET VAULT

Select the device to backup to:  
IV-System Grid

Remote Server:  
n1g8.vaultlogix.com:2430 ( UT )  
Add... Modify... Delete Test

Keep only 10 last successful generations (0 - unlimited)

If backup is not completed in 2 hours, stop and continue the backup next time (0 - unlimited)

☐ Backup ACLs for files Compression level: Default compression

☐ Backup alternate data streams Method of transfer: Block Level Backup

☒ Use initial exported backup for later import Encryption method: BlowFish 64-bit

Only the first initial backup will be created to local storage, all subsequent executions of this backup job will be run to the specified server. Subsequent backups can be run before the data is imported to the server.  
Base storage path for large initial backup (typically a USB/firewire) device:  
Browse...

Your data encryption password will be automatically generated.  
Data is encrypted and compressed before leaving your computer.

< Back Next > Cancel

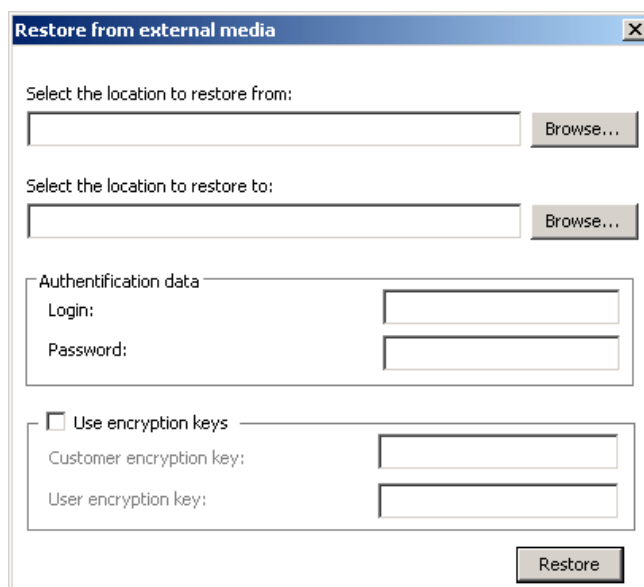
5. Continue with the backup as normal (see **Creating a Backup Set**)
6. Done

## Importing Data from an Emergency Restore

In case of disaster, an organization's restore window is usually very limited because time is money. Internet Vault helps solve this obstacle by eliminating the need of restoring large amounts of data over the wire by allowing the server administrator to export a user's backup set(s) to a physical removable disk, which will then be shipped via courier service.

**NOTE:** All data will remain encrypted, de-duped and compressed on disk until it is imported by the user with the VaultLogix IV-Client

1. From the VaultLogix IV-Client, Click **Tools> Restore from external media**
2. Select the location of the removable physical media and the restore location
3. Enter in your username/password that is used to connect to the VaultLogix server
4. Enter in the Customer and User Encryption Key(s) (optional)
5. Click **Restore**
6. Done



**Restore from external media**

Select the location to restore from:

Browse...

Select the location to restore to:

Browse...

Authentication data

Login:

Password:

☐ Use encryption keys

Customer encryption key:

User encryption key:

Restore



## Reports and Logs

### Report Statuses

**Backup job was successful:** This message reports that all files were successfully backed up.

**Backup job was successful with exceptions:** This message reports that some files were skipped during the backup job. The most common reason is that the files were either open, in-use or locked during the backup. To avoid skipping files install the ROBO-fm open file add-on after installing the IV-Client.

**Backup job was cancelled:** This message reports that the backup job was cancelled by the backup owner.

**Note:** For a complete list of descriptions please see the VaultLogix knowledge base under your VaultLogix customer portal

### Viewing Reports Listed By Backup Job

1. Click View list of reports by computer name
2. Click the appropriate + sign to bring up the list of backup or restore reports you wish to view
3. Proceed with displaying the report

### Enabling Client Side Logs

1. From the main IV-Client landing window Click **Preferences**
2. Click **Log**
3. Choose the Logs to enable and you're all set

## Enabling Client Side XML Logs

The built in **XML** notifications outputs all the files backed up with their respect modification dates. This can be used to parse out information about the backup and upload it to an external application.

1. Open up the IV-Client
2. On the report/log screen within the IV-Client Click on all the check boxes under **XML Notifications**
3. Continue to complete the backup job creation as usual (See **Creating a Backup Set**)
4. Done

The XML notifications are stored at

**Windows 2000, 2003, XP:**

C:\Documents and Settings\All Users\Application Data\BackupClient\XMLReports

**Windows Vista, 7, 2008:**

C:\ProgramData\BackupClient\XMLReports